

Toolkit

Creating Collaborative Action Teams

WORKING TOGETHER FOR STUDENT SUCCESS



Getting Started

Mobilizing the Team

Setting Direction

Taking Action

REVIEWING AND REFINING

Catherine Jordan
Amy Averett
Jerry Elder
Evangeline Orozco
Zena Rudo

Creating Collaborative Action Teams

Working Together for Student Success

Toolkit



Catherine Jordan
Amy Averett
Jerry Elder
Evangelina Orozco

Copyright © 2000 Southwest Educational Development Laboratory
All rights reserved.
Not to be reproduced without permission of the publisher.

**Southwest Educational
Development Laboratory**

211 E. Seventh Street
Austin, TX 78701
voice: 512/476-6861
fax: 512/476-2286
www.sedl.org

Editorial services by

Castle Communications

Austin, Texas
512/346-2375

Design by

Janice McLemore Graphic Design Inc.

Austin, Texas
512/327-7977

© Southwest Educational Development Laboratory. This publication was produced in whole or in part with funds from the Office of Educational Research and Improvement, U.S. Department of Education, under contract #RJ96006801. The content herein does not necessarily reflect the views of the Department of Education, any other agency of the U.S. Government or any other source.

Table of Contents

| | |
|---------------------------|---|
| Introduction | 1 |
|---------------------------|---|

Stage 1: GETTING STARTED



Activities:

- Introduce the Process 1-1
- Define Your School Community 1-9
- Examine Your School Community 1-13
- Plan the First Steps 1-17

Stage 2: MOBILIZING THE TEAM



Activities:

- Define Your Representative Membership 2-1
- Build Your Representative Membership 2-7
- Determine Communication Ground Rules 2-11
- Build Common Understanding 2-15
- Examine Team Decisions 2-21
- Use Consensus Decision Making 2-25
- Share Leadership Responsibilities 2-29
- Take on Leadership Roles 2-33
- Develop Leadership through Mentoring 2-39

Stage 3: SETTING DIRECTION



Activities:

- Agree on a Vision 3-1
- Assess Your School Community 3-5
- Identify School Community Issues 3-9
- Develop a Mission Statement 3-15
- Set Team Goals 3-21
- Define the Audience and the Message 3-25
- Create a Communications Plan 3-31

Stage 4: TAKING ACTION



Activities:

- Develop Strategies 4-1
- Define Tasks and Resources 4-5
- Determine Responsibilities and Timelines 4-9
- Establish Evaluation Methods 4-13
- Report Progress and Review Responsibilities 4-19
- Recognize Member Contributions 4-23
- Expand Network Opportunities 4-27

Stage 5: REVIEWING AND REFINING



Activities:

- Assess Team Effectiveness 5-1
- Celebrate Your Successes 5-5
- Increase Effectiveness and Impact 5-9

| | |
|------------------------------------|-----|
| Troubleshooting Guide | 6-1 |
|------------------------------------|-----|

| | |
|--|-----|
| Team Icebreakers and Energizers | 7-1 |
|--|-----|

Introduction

This Toolkit serves as a companion to the *Creating Collaborative Action Teams Guide*. It provides a variety of “tools” that you can use to help your team move through the Collaborative Action Team process. Each Toolkit Activity is linked to the stages and steps described in the Guide. You may not need everything in the Toolkit to develop a Collaborative Action Team and reach your goals. You will, however, most likely find the Toolkit Activities very useful. The table below describes the specific resources included in this Toolkit, how they can help your team, and the core concept that they support.

| Toolkit | They help your team . . . | They support these core concepts . . . |
|---------------------------------------|---|---|
| Stage 1: Getting Started | | |
| Introduce the Process | Understand the Collaboration Action Team process, collaboration theory and purpose. | All |
| Define Your School Community | Understand who the team will serve and include. | Representative Membership |
| Examine Your School Community | Learn about the school community; understand the factors that impact team development. | Taking Action |
| Plan the First Steps | Organize team logistics and plan productive team meetings. | Shared Leadership, Taking Action |
| Stage 2: Mobilizing the Team | | |
| Define Your Representative Membership | Learn who needs to be on the team and how to recruit them; address diversity in your team. | Representative Membership Shared Leadership Taking Action |
| Build Your Representative Membership | Refine strategies for recruiting new team members. | Representative Membership Shared Leadership Taking Action |
| Determine Communication Ground Rules | Set rules for communication among team members: respect, listening, speaking, focusing on the agenda. | Consensus Decision Making |
| Build Common Understanding | Understand each other’s perspectives, learn to listen and respect each other. | Representative Membership Shared Leadership Consensus Decision Making |
| Examine Team Decisions | Review how team decisions are made and whether anybody holds too much power or influence. | Consensus Decision Making |
| Use Consensus Decision Making | Improve the team’s skills in consensus decision making. | Consensus Decision Making |

| Toolkit | They help your team . . . | They support these core concepts . . . |
|---|--|---|
| Stage 2: Mobilizing the Team (continued) | | |
| Share Leadership Responsibilities | Spread out team responsibilities, power and influence; prevent burn-out and ensure follow-through. | All |
| Take on Leadership Roles | Understand members' strengths and abilities and how they can be used; provide team leadership, empower non-traditional leaders. | All |
| Develop Leadership through Mentoring | Empower non-traditional leaders; encourage supportive relationships between team members. | All |
| Stage 3: Setting Direction | | |
| Agree on a Vision | Develop a sense of direction, commitment and purpose; address values and beliefs. | Representative Membership Consensus Decision Making |
| Assess Your School Community | Learn first-hand about school community needs and resources. | Taking Action |
| Identify School Community Issues | Find and prioritize the most urgent or important school community issues. | Representative Membership Consensus Decision Making Taking Action |
| Develop a Mission Statement | Determine specifically how to state your team's identity and purpose. | Consensus Decision Making Taking Action |
| Set Team Goals | Determine team goals, based on priority issues. | Consensus Decision Making Taking Action |
| Define the Audience and the Message | Let others know who you are and what you want to do. | Representative Membership Consensus Decision Making |
| Create a Communications Plan | Plan how you will "tell your story"; gain respect, credibility and support. | Representative Membership Consensus Decision Making Taking Action |
| Stage 4: Taking Action | | |
| Develop Strategies | Determine what you must do to achieve your goals. | Consensus Decision Making Taking Action |
| Develop Tasks and Resources | Identify the tasks for each strategy; determine what resources you need and how to obtain them. | Taking Action |
| Determine Responsibilities and Timelines | Assign members to different tasks; provide deadlines for accountability and monitoring. | Shared Leadership Taking Action |
| Establish Evaluation Methods | Determine the expected outcomes for each strategy; decide how you'll measure your success. | Consensus Decision Making Taking Action |
| Report Progress and Review Responsibilities | Keep momentum up while carrying out your action plan; help members who encounter difficulties, ensure follow-through and accountability. | Representative Membership Shared Leadership Taking Action |

| Toolkit | They help your team . . . | They support these core concepts . . . |
|---|--|---|
| Recognize Member Contributions | Encourage members as they work; recognize them when they follow through and get work done. | Representative Membership Shared Leadership Taking Action |
| Expand Network Opportunities | Develop links with other organizations and people in the school community; gain support and assistance for getting resources. | Representative Membership Shared Leadership Taking Action |
| Stage 5: Reviewing and Refining | | |
| Assess Team Effectiveness | Evaluate how well the team has collaborated. | All |
| Celebrate Your Successes | Privately and publicly recognize and reward members' and non-members' contributions; gain more support and recognition in the school community. | Representative Membership Shared Leadership Taking Action |
| Increase Effectiveness and Impact | Assess external and internal changes and make adjustments to move forward; customize the Collaborative Action Team process; think about the team's future. | All |
| Toolkit Resources | | |
| Troubleshooting Guide | Identify resources to address barriers to success. | All |
| Team Icebreakers and Energizers | Make meetings, retreats and/or presentations more fun and effective; keep energy levels high; help team members feel more comfortable working together. | All |

Most of the materials in the [Toolkit](#) follow the same order as the [Guide](#). Each activity contains ready-to-use instructions and materials the facilitator can use. Goals and timeframes for each activity are also identified. The times listed are general guidelines and can vary depending on the number of people participating. Facilitators may tailor the materials to meet the team's needs. Facilitators can also copy the appropriate background information from the Guide to use during an activity.

Specifically, each activity includes the following:

- Preparation and room set-up instructions
- Goals and key introductory points for the session
- Step-by-step instructions and estimated time
- Wrap-up points
- Follow-up reminders

The last part of the Toolkit includes additional resources that are not specific to any particular stage or step. You can use these materials at any time in the process. The **Troubleshooting Guide** will help you select the most appropriate resource to address a specific problem that your team is facing. The **Team Icebreakers and Energizers** are short activities you can use during team meetings to get everyone actively involved and more comfortable working together.

Keep in mind that these materials were designed to be flexible in order to meet your team's needs. You can use the activities with smaller groups or committees, instead of a whole team. You can also combine some of the tools in order to accomplish certain goals. Some common combinations follow:

Start-Up Training for a new Collaborative Action Team (1 Day)

- Icebreaker
- Introduce the Process
- Determine Communication Ground Rules
- Define Your School Community
- Examine Your School Community
- Build Common Understanding
- Plan the First Steps

Start-Up Training for an existing group that has adopted the process (1 Day)

- Icebreaker
- Introduce the Process
- Define Your School Community
- Examine Your School Community
- Examine Team Decisions
- Assess Team Effectiveness
- Share Leadership Responsibilities
- Plan the First Steps

Re-Charge Training for a team that has lost momentum or changed focus (1 Day)

- Icebreaker
- Introduce the Process
- Assess Team Effectiveness
- Examine Team Decisions
- Build Common Understanding
- Increase Effectiveness and Impact

Team-Building Retreat (1 Day)

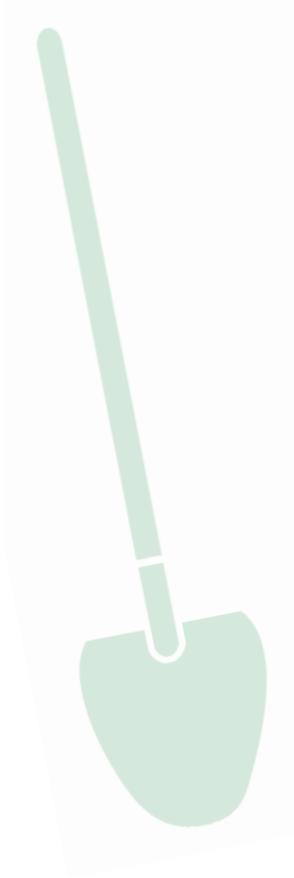
- Icebreaker
- Assess Team Effectiveness
- Examine Team Decisions
- Take on Leadership Roles
- Recognize Member Contributions
- Build Common Understanding
- Agree on a Vision

Action-Planning Retreat (1 Day)

- Examine Your School Community (complete prior to retreat)
- Icebreaker
- Agree on a Vision
- Identify School Community Issues
- Develop a Mission Statement
- Set Team Goals
- Develop Strategies
- Define Tasks and Resources
- Determine Responsibilities and Timelines

SEDL's research and field experience suggest that true collaboration to bring positive change requires investing time and effort to develop team skills and relationships. These materials are designed to guide the process of building collaborative teams that work effectively, have solid plans for action and can implement their plans to improve results for students and their families.

Stage 1: GETTING STARTED



Step: Introduce the Process

Activity Introduce the Process

(65–130 minutes)

Goals

- Gain a general understanding of the Collaborative Action Team process.
 - Determine which activities the team has already accomplished.
-

Preparation

In Advance

- Make copies of handouts and prepare transparencies for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Overhead projector and screen

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.

Note to facilitator: You can use this activity in a variety of situations to give an overview of the Collaborative Action Team process. The time it takes to complete the activity will depend on the situation. Allow 2 hours if you're introducing and discussing the process with your team for the first time.

INTRODUCTION *(less than 5 minutes)*

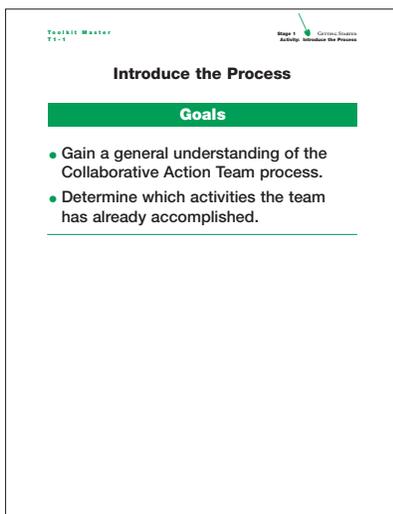
Goals

- Tell participants this activity will provide an overview of the Collaborative Action Team process.
- Share the goals of this activity by displaying [Transparency #T1-1](#).

Key Points

- If you're presenting this information to an existing collaborative team, explain that members don't have to "reinvent the wheel" by going through every step.
- You will have a chance to identify which steps in the process your team has already completed.

T1-1



Toolkit Master
T1-1

Page 1  Getting Started
Activity: Introduce the Process

Introduce the Process

Goals

- Gain a general understanding of the Collaborative Action Team process.
- Determine which activities the team has already accomplished.

INSTRUCTIONS

Step 1 (5 minutes)

Explain the term Collaborative Action Team and introduce the core concepts of the process by displaying [Transparencies #T1-2–T1-4](#).

T1-2

Toolkit Masters
T1-2

Stage 1
Activity: Introduce the Process

Collaborative Action Team Overview



T1-3

Toolkit Masters
T1-3

Stage 1
Activity: Introduce the Process

What is a Collaborative Action Team?

A partnership between school, home, community and student representatives that identifies pressing issues in a school community and takes action to address them.

T1-4

Toolkit Masters
T1-4

Stage 1
Activity: Introduce the Process

Core Concepts

- Representative membership
- Shared leadership
- Consensus decision making
- Action focus

Step 2 (5-10 minutes)

Explain the core concept of [Representative Membership](#) by displaying [Transparency #T1-5](#).

Distribute [Handout #H1-1](#). Ask participants to think about other people in the [school community](#) they could add to the list of potential team members.

T1-5

Toolkit Masters
T1-5

Stage 1
Activity: Introduce the Process

Representative Membership

- Consists of a cross section of the school community: family members, community members, school personnel and students.
- Helps the team better identify and meet school community needs.
- Reinforces local control and self-reliance.

H1-1

Toolkit Masters
H1-1

Stage 1
Activity: Introduce the Process

Potential Team Members

Each school community is unique. The people who represent your school community will differ from those who represent another school community. Here are some common examples of potential team members:

| | |
|--|--|
| <p>School</p> <ul style="list-style-type: none"> Teachers Superintendent Administrators Secretaries Principals Parent involvement staff Janitors Community liaisons Teachers aides Security guards Trick staff Union representatives <p>Home</p> <ul style="list-style-type: none"> Parents of students Grandparents Older siblings and cousins Other relatives Other guardians PTA members Classroom volunteers Parent Advisory Committee members | <p>Community</p> <ul style="list-style-type: none"> Elected officials Neighbors Senior citizens Block club representatives Service organizations Historians/Societies Youth-serving agencies Family-serving agencies Business owners Police/Fire departments Churches and synagogues Colleges and universities County extension office Museum representatives Library representatives <p>Students</p> <ul style="list-style-type: none"> Class officers Community service club members Peer counselors/trainees Students not involved in extracurriculars Alternative high school students Homeroom representatives Students who are not "traditional leaders" |
|--|--|

Step 3 (5-10 minutes)

Explain the core concept of **Shared Leadership** by displaying [Transparency #T1-6](#).

Distribute [Handout #H1-2](#). Discuss the concepts related to shared leadership.

T1-6

Toolkit Masters
T1-6

Page 1  Getting Started
Activity: Introduce the Process

Shared Leadership

- All team members share leadership roles and responsibilities.
- All team members are equally included in the following:
 - Representing the team
 - Making decisions
 - Carrying out responsibilities
 - Sharing success

H1-2

Toolkit Masters
H1-2

Page 1  Getting Started
Activity: Introduce the Process

Values of Shared Leadership

- We, not I
- Trust among members
- Diverse perspectives
- Preparing members for leadership
- Empowering members through shared responsibility
- Appreciating each team member's expertise and skill

Traditional vs. Shared Leadership

| | |
|--|--|
| Closed Participation Followers listen and do what they are told. | Broad Participation All team members participate actively in any discussion or decision the team makes. |
| Centralized Power Followers conform and take no part in making decisions. | Decentralized Power Diverse perspectives are valued as a way to increase everyone's knowledge. |
| Vertical Relationships Decisions come from the top. | Horizontal Relationships All team members have equal opportunity to participate. |
| Focus on Cooperation School, home, community and students work informally with, but independent of each other. | Focus on Collaboration School, home, community and students formally share resources, power and authority to accomplish a mutual goal. |
| Leadership Based I, you, he or she is accountable. | Community Based We take responsibility. |
| Autocratic One voice dominates. | Democratic Many voices are heard. |
| Rigid Leadership is task-oriented, regardless of the situation. | Flexible Leadership is group-oriented and sensitive to the situation. |

Step 4 (5-10 minutes)

Introduce the core concept of **Consensus Decision Making** by displaying [Transparency #T1-7](#).

Distribute [Handout #H1-3](#). Discuss the information related to consensus decision making.

T1-7

Toolkit Masters
T1-7

Page 1  Getting Started
Activity: Introduce the Process

Consensus Decision Making

- Team decisions reflect the viewpoints of all involved and all members agree to support them.
- Team members discuss issues, listen to each other, work to resolve differences and reach decisions based on a general agreement.

H1-3

Toolkit Masters
H1-3

Page 1  Getting Started
Activity: Introduce the Process

Consensus Decision Making

Consensus decision making is one of the most effective methods of group decision making. It requires that all members agree that they can live with the decision. In other words, even though the decision may not represent an individual's preferred choice, he or she will agree to support it. Consensus decision making is the recommended method for reaching major decisions and building group support in a Collaborative Action Team. Some people feel it takes too much time. However, teams using consensus decision making are likely to have higher ownership of their decisions in the long run. Therefore, team members will invest more time in supporting decisions and less time in rehashing, complaining or failing to carry them out.

Characteristics of Consensus Decision Making

- All members contribute. Everyone's opinion is used and encouraged. Differences are viewed as helpful, rather than hindering and disruptive.
- Everyone has an opportunity to share feelings about an issue through group surveys.
- Team members who continue to disagree indicate that they're willing to experiment and "live with" a decision for a while.
- All members share in the final decision.

Consensus Decision Making is Not:

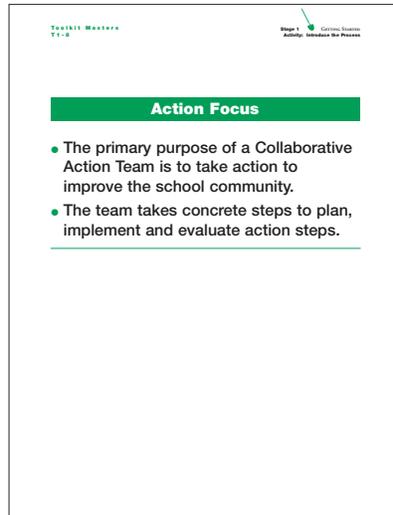
- A vote for unanimity.
- The result of the leader's preference or someone else's first choice.
- Everyone fully agreeing with the decision.
- Without conflict or frustration.

Step 5 (5-10 minutes)

Introduce the core concept of **Action Focus** by displaying [Transparency #T1-8](#).

Distribute [Handout #H1-4](#). Discuss the process of **action planning**.

T1-8



Action Focus

- The primary purpose of a Collaborative Action Team is to take action to improve the school community.
- The team takes concrete steps to plan, implement and evaluate action steps.

H1-4



Action-Planning Steps

Agree on a Vision
What is your "dream" for your school community?

Identify and Prioritize School Community Issues
What challenges face your school community that keep your team's vision from becoming a reality? Which challenge is your top priority?

Develop a Mission Statement
What is the purpose of your team, based on your vision and the issues you've identified?

Set Team Goals
What general results do you want to achieve in each priority area?

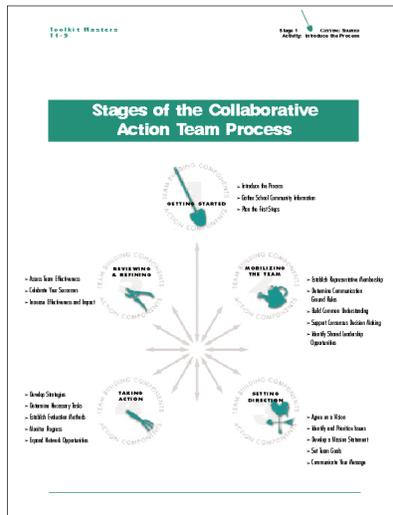
Develop Strategies to Accomplish Goals
For each goal, what different strategies will you use to achieve the results you want?

Determine Necessary Tasks
What specific tasks must you do to implement your strategy?
What resources are needed?
Who will be responsible for completing the task?
When will each task be done?

Step 6 (5-10 minutes)

Explain that teams go through five **stages** of development, as displayed in [Transparency #T1-9](#). Emphasize that the stages are not "stair steps"; they're simply a guide to how teams generally develop. The **Collaborative Action Team process** is flexible, and your team's experience may differ somewhat.

T1-9



Stages of the Collaborative Action Team Process

GETTING STARTED

- Introduce the Process
- Gather School Community Information
- No Set Steps

MOBILIZING THE TEAM

- Establish Representative Membership
- Determine Communication Goals/Plan
- Build Common Understanding
- Support Common: Action Planning
- Develop Shared Vision/OP
- Operate

SETTING DIRECTION

- Agree on a Vision
- Identify and Prioritize Issues
- Develop a Mission Statement
- Set Team Goals
- Communicate Your Strategy

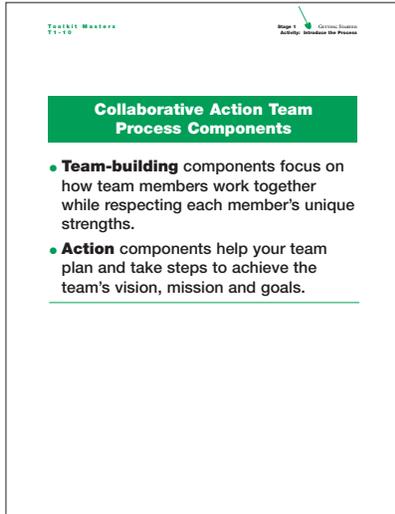
TAKING ACTION

- Develop Strategies
- Determine Necessary Tools
- Establish Evaluation Methods
- Assign Roles
- Support Mutual Accountability

REVISITING & REFINING

- Assess Team Effectiveness
- Celebrate Team Successes
- Assess the Process and Report

T1-10



Collaborative Action Team Process Components

- **Team-building** components focus on how team members work together while respecting each member's unique strengths.
- **Action** components help your team plan and take steps to achieve the team's vision, mission and goals.

Step 7 (5-10 minutes)

Explain that each stage is made up of different steps. Every activity has both team-building and action components. Explain these components by displaying [Transparency #T1-10](#).

- **Team-building** components relate to the core concepts of representative membership, shared leadership and consensus decision making.
- **Action** components relate to the core concept of action focus.

Step 8 (5-10 minutes)

Distribute [Handout #H1-5](#). Display [Transparency #T1-11](#). As you discuss the steps in each stage, ask participants to evaluate whether or not they have already completed that step.

Explain the steps in Stage 1, based on [Handout #H1-5](#).

H1-5



Collaborative Action Team Process Steps

The Collaborative Action Team process involves five stages and twenty-one major steps:

Stage 1: Getting Started

Introduce the Process
The team gets an overview of the Collaborative Action Team process. This helps team members assess what activities they have already accomplished.

Gather School Community Information
The team defines "school community" in their own terms and gathers information about it. This provides an opportunity to identify factors in the school community that might affect team development.



Plan the First Steps
The team plans how to deal with the "nuts and bolts" of keeping the team organized. The team also plans the first official meeting.

Identify Shared Leadership Opportunities
Team members learn more about each other's strengths and skills. They match their strengths to team leadership roles and responsibilities.

Stage 3: Setting Direction

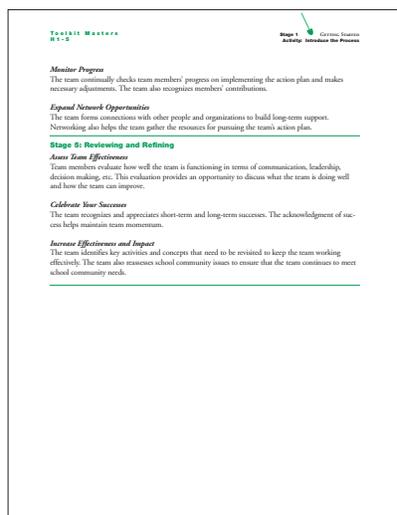
Agree on a Vision
The team agrees on a common vision—a "dream" for the school community's future. A team vision helps members stay focused on accomplishing the team's goals.

Identify and Prioritize Issues
The team gathers and analyzes information about the challenges the school community faces. Team members then come to consensus and prioritize those issues they feel are most important to address.

Develop a Mission Statement
The team develops a mission statement that reflects who the team is and what the team will achieve. This statement helps team members and the overall school community understand why the team exists.

Set Team Goals
The team develops specific statements about what team members will do to address priority issues. These goals help the team stay focused on results.

Communicate Your Message



Monitor Progress
The team continually checks team members' progress on implementing the action plan and makes necessary adjustments. The team also recognizes members' contributions.

Expand Network Opportunities
The team forms connections with other people and organizations to build long-term support. Networking also helps the team gather the resources for pursuing the team's action plan.

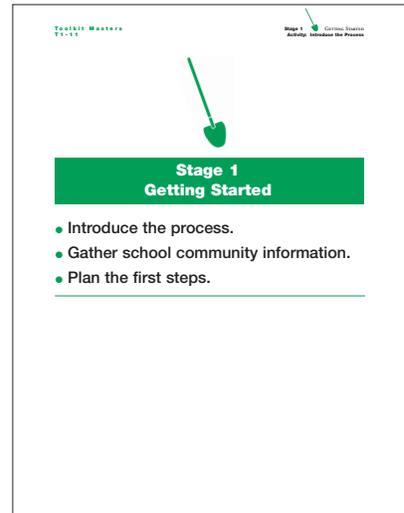
Stage 5: Reviewing and Refining

Assess Team Effectiveness
Team members evaluate how well the team is functioning in terms of communication, leadership, decision making, etc. This evaluation provides an opportunity to discuss what the team is doing well and how the team can improve.

Celebrate Your Successes
The team recognizes and appreciates short-term and long-term successes. The acknowledgment of success helps maintain team momentum.

Increase Effectiveness and Impact
The team identifies key activities and concepts that need to be revisited to keep the team working effectively. The team also reassesses school community issues to ensure that the team continues to meet school community needs.

T1-11



Stage 1 Getting Started

- Introduce the process.
- Gather school community information.
- Plan the first steps.

T1-12



**Stage 2
Mobilizing the Team**

- Establish representative membership.
- Determine communication ground rules.
- Build common understanding.
- Support consensus decision making.
- Identify shared leadership opportunities.

Step 9 (5-10 minutes)

Display [Transparency #T1-12](#) and explain steps in Stage 2, based on [Handout #H1-5](#).

T1-13



**Stage 3
Setting Direction**

- Agree on a vision.
- Identify and prioritize issues.
- Develop a mission statement.
- Set team goals.
- Communicate your message.

Step 10 (5-10 minutes)

Display [Transparency #T1-13](#) and explain the steps in Stage 3, based on [Handout #H1-5](#).

T1-14



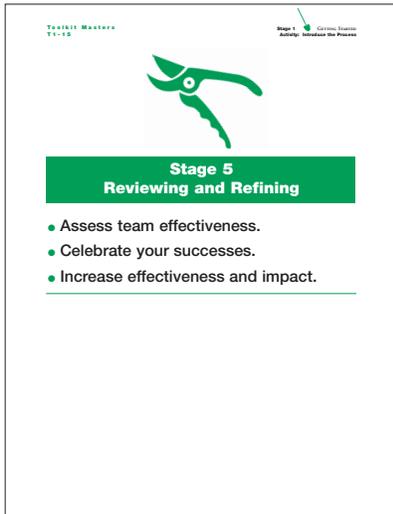
**Stage 4
Taking Action**

- Develop strategies.
- Determine necessary tasks.
- Establish evaluation methods.
- Monitor progress.
- Expand network opportunities.

Step 11 (5-10 minutes)

Display [Transparency #T1-14](#) and explain the steps in Stage 4, based on [Handout #H1-5](#).

T1-15



Step 12 (5-10 minutes)

Display [Transparency #T1-15](#) and explain the steps in Stage 5, based on [Handout #H1-5](#).

Step 13 (5-10 minutes)

Ensure that everyone understands the core concepts, stages and steps of the Collaborative Action Team process. Decide if you've already completed any of these steps. Discuss how your team can ensure that new members get oriented to the Collaborative Action Team process when they join the team.

WRAP-UP (less than 5 minutes)

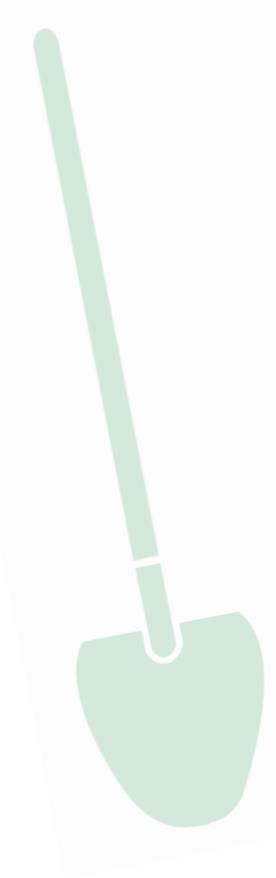
Key Points

- The Collaborative Action Team is based on four core concepts and takes teams through a five-stage process.
- The Collaborative Action Team process is designed to be a flexible process. You may complete steps in the order that best fits your team's situation.

FOLLOW-UP

- No follow-up is needed for this activity.

Stage 1: GETTING STARTED



Step: Gather School Community Information

Activity Define Your School Community

(45 minutes)

Goal

- Define your school community to clarify who should be on your team and who you want to impact.
-

Preparation

In Advance

- Prepare the transparency for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Overhead projector and screen
- Markers, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.

T1-16



Toolkit Materials
T1-16

Stage 1  Getting Started
Activity: Define Your School Community

Define Your School Community

Goal

- Define your school community to clarify who should be on your team and who you want to impact.

INTRODUCTION *(less than 5 minutes)*

Goal

- Share the goal of this activity by displaying [Transparency #T1-16](#).

Key Points

- A *school community* consists of all the people and organizations that either affect or are affected by the school. However, it's important for the team to define what the term means for *your* community.
- How you define school community will determine how your team is formed and what action the team takes.

INSTRUCTIONS

Step 1 *(10 minutes)*

Explain that the team should consider several factors when defining the school community. You may want to refer to the examples provided in the background information for this activity in the [Guide](#). Some of the factors your team should consider follow:

- **History**—How have schools in your community related to each other in the past? Do the schools share a common history or have they each had unique experiences?
- **Geography**—How is the community organized physically? Are there natural or man-made boundaries that people recognize (rivers, hills, highways, etc.)? Are certain neighborhoods closely affiliated with certain schools?
- **Administrative Organization**—How is the school administration organized? Is there one administrative structure for the whole district, or is it broken down into smaller parts?
- **Needs**—Does some group within the school district need more services or perform less well than others?
- **Opportunities**—Are there opportunities your team could pursue that would be affected by your definition of school community? Are there funding criteria to be met?
- **Common Interests**—Do several schools have issues in common? Do people from different schools have overlapping interests?

Step 2 (15 minutes)

Divide a flipchart sheet into four columns. Label the columns “School,” “Cluster,” “District” and “Other.” Explain each of these terms to your team, as follows:

- **School**—one school or campus
- **Cluster**—one high school and all of the middle and elementary schools that feed into it (feeder pattern)
- **District**—the whole school district
- **Other**—any other way your school district is organized

For each column, ask team members to discuss the pros and cons of defining the school community at that level. Record these pros and cons on the flipchart.

Step 3 (10 minutes)

Based on your team’s discussion of pros and cons, reach consensus on a definition for your school community. If there’s no clear choice, suggest that the team choose one for the time being and reevaluate it in the future.

Step 4 (5 minutes)

If key administrators (principal, superintendent, etc.) from the school community you've defined aren't present, ask for volunteers to meet with them to share your plan for developing a Collaborative Action Team. Stress the importance of obtaining administrative support. Such support is *crucial* to the success of your efforts. You need to inform and include administrators from the beginning.

WRAP-UP (less than 5 minutes)

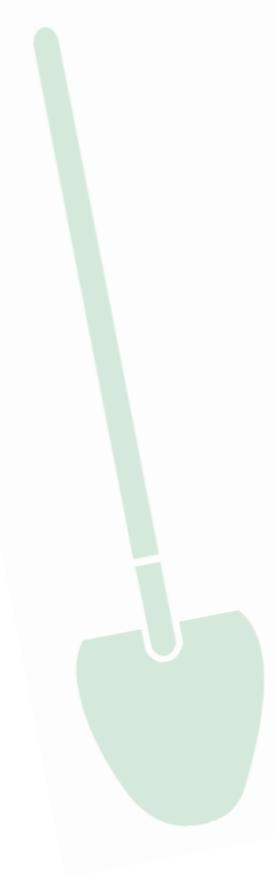
Key Points

- Remind your team that the school community includes anyone who either affects or is affected by the school. Your team will work to ensure that representatives from all parts of the school community are involved in this collaboration.
-

FOLLOW-UP

- Work with volunteers to ensure that administrators are informed about your team. Ask administrators for written letters of support that identify what resources they will contribute to the collaboration.

Stage 1: GETTING STARTED



Step: Gather School Community Information

Activity Examine Your School Community

(45 minutes)

Goals

- Assess factors in your school community that will affect the ongoing development of your team.
 - Gather information about your school community to help the team make future decisions.
-

Preparation

In Advance

- Make copies of handouts and prepare transparencies for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Overhead projector and screen
- Markers, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.

INTRODUCTION *(less than 5 minutes)*

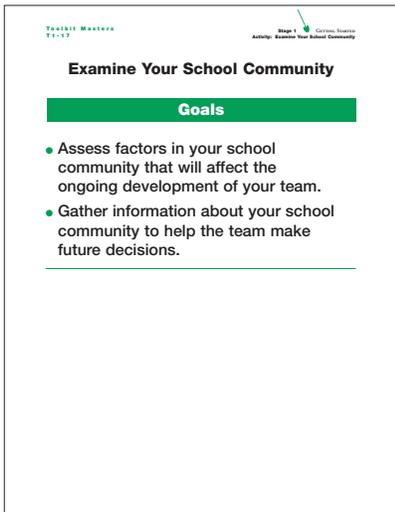
Goals

- Share the goals of this activity by displaying [Transparency #T1-17](#).

Key Points

- Several factors in a school community can affect team development, either positively or negatively. Your team needs to know about these factors so the team can take advantage of opportunities and avoid pitfalls.
- To make good decisions based on facts, your team must gather information about the school community. This will help you take action more effectively.

T1-17



Toolkit Masters
T1-17

Stage 1  GETTING STARTED
Activity: Examine Your School Community

Examine Your School Community

Goals

- Assess factors in your school community that will affect the ongoing development of your team.
- Gather information about your school community to help the team make future decisions.

INSTRUCTIONS

T1-18

Toolkit Masters
T1-18

Step 1  Getting Started
Activity: Examine Your School Community

Factors That Could Impact Our Team's Development

- Characteristics of team leaders
- Accommodation of members' needs
- School system influences
- Community culture
- Access to local resources
- Common direction
- Communication
- Shared leadership

Step 1 (5 minutes)

Explain that a number of factors can affect team development by displaying [Transparency #T1-18](#).

H1-6

Toolkit Masters
H1-6

Step 1  Getting Started
Activity: Examine Your School Community

Factors That Impact Team Development

1. **Characteristics of team leaders**—individual traits, “people skills,” attitudes about teamwork and commitment to collaborate.
Example: The key facilitators of one Collaborative Action Team found they each have different skills. One is the motivator and “shepherds.” The other ensures that team members follow through on the team’s ideas. People enjoy being on the team both because it’s exciting and motivating and because it achieves results.
2. **Accommodation of members’ needs**—awareness of and response to the possible challenges people must confront in order to participate on the team.
Example: One Collaborative Action Team whose priority issue was “increasing parent involvement” began team meetings at 3:30 p.m. This was a great time for school representatives, but parent attendance was very low. After switching the meeting

Step 2 (10 minutes)

Distribute [Handout #H1-6](#). Discuss the factors and the examples from other Collaborative Action Teams. Emphasize the fact that you may discover other factors that will impact your team’s efforts as you go through the [Collaborative Action Team process](#).

Toolkit Masters
H1-6

Step 1  Getting Started
Activity: Examine Your School Community

5. **Access to local resources**—the ability to supply basic resources for holding meetings, maintaining membership lists and notifying members of activities.
Example: One Collaborative Action Team was meeting in a variety of places. This made it more difficult for team members to keep track of the location for each month’s meeting. The school district purchased a vacant building for a parent resource center and now encourages the team to hold its meetings there.
6. **Common direction**—the ability to agree on priority issues, develop goals and turn the team’s vision into reality.
Example: One Collaborative Action Team quickly selected “improving communication between the school and the home” as a priority issue. The team decided to send the manager in front of the school. The Parent Teacher Organization provided funds to purchase paint, letters and plans for landscaping. Now, when parents drive up to drop off or pick up their children, they see current information about school activities and functions.
7. **Communication**—ground rules that address interactions between team members during and outside of meetings, as well as written forms, such as meeting notices and summaries.
Example: One Collaborative Action Team developed a system to ensure that people were informed about the team. Before each meeting, notices are mailed, posted in the newspapers, sent home with students and announced on the radio. Current team members also receive a reminder phone call. The team’s efforts have resulted in consistent participation by a diverse group of community members.
8. **Shared leadership**—covers a range of items from developing local leadership to consensus decision making to contributing resources.
Example: One team decided to have a three-member leadership team with one home, one school and one community representative. This trio holds a leadership meeting before each monthly team meeting. The trio plans the meeting agenda and agrees on the roles and responsibilities they will take for the meeting.

H1-7

Factors That Could Impact Our Team's Development

| Factors | Impact on Our Team |
|---|--------------------|
| Characteristics of team leaders: individual traits, "people skills," attitudes about teamwork, and commitment to collaborate | |
| Accommodation of members' needs: awareness of and response to the possible challenges people must confront in order to participate on the team | |
| School system influence: the degree to which the school district and/or school campus supports the process | |
| Community culture: common attitudes, values and patterns of behavior in the community | |
| Access to local resources: the ability to supply basic resources for holding meetings, maintaining membership lists and notifying members of activities | |
| Common direction: the ability to agree on priority issues, develop goals and turn the team's vision into reality | |
| Communication: covers conducting meetings, interaction between members and written communication | |
| Shared leadership: covers developing local leadership, making decisions by consensus and contributing resources | |

Step 3 (15 minutes)

Distribute [Handout #H1-7](#). Discuss how each factor might impact your team's development, positively and negatively. Write these factors on a flipchart sheet. Encourage members to fill in this information on their handouts during the discussion. Remind team members that keeping these factors in mind will help them act strategically. Addressing these factors prepares your team to take advantage of potential opportunities and to avoid potential pitfalls.

H1-8

School Community Information

| Types of Information | Sources of Information | Who will collect |
|---|---|------------------|
| Student Information | | |
| Student enrollment information: age, ethnicity, gender, etc. | School District Data Division School District website State Department of Education | |
| Percentage of students from economically disadvantaged households | Same as above | |
| Percentage of students from | Same as above | |
| School Community Information | | |
| School district contact information: superintendent, principal, school board | Same as above | |
| School improvement plan/school district strategic plan | Same as above School principal | |
| Student handbook | School principal | |
| School-sponsored programs and services for students and their families | Same as above | |
| School rankings from State Department of Education | Same as above State Department of Education | |
| PTA contact information | School principal | |
| Community Information | | |
| Community maps: school feeder patterns, etc. | Public Library City Hall | |
| Census information | Public Library City Hall State government website | |
| Programs and services available to families | United Way Department of Human Services Other nonprofit organizations | |
| General community information: business/industry, colleges/universities, etc. | Chamber of Commerce Public Library Tourism and Visitors' Bureau | |

Step 4 (10 minutes)

Explain that the team will now plan how to gather information about school community needs and resources. Gathering such information early on will help your team make informed decisions as it develops. Distribute [Handout #H1-8](#). Lead a discussion about what information your team will gather, how you will find the information and who will be responsible for collecting it. Remind team members that they don't have to collect this information all at once—they just need to *start* collecting it.

WRAP-UP (less than 5 minutes)

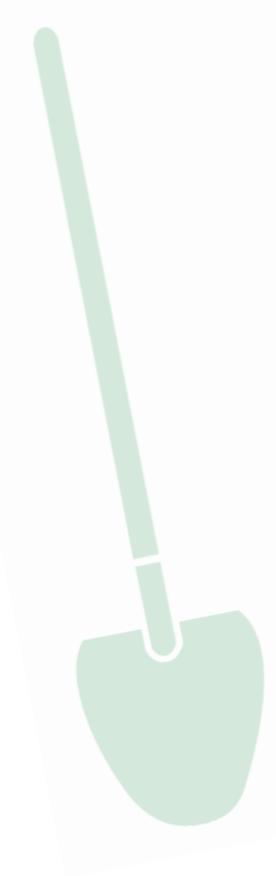
Key Points

- Gathering information about the school community will help you plan your team's development and actions strategically. This way, the team can take advantage of opportunities and avoid pitfalls later on.
- Gathering general information about the school community will also help your team make fact-driven decisions. This will help your team's efforts be more effective.

FOLLOW-UP

- Assist team members as they gather school community information. Ensure that the information is presented in a form all team members can understand. Work closely with team members to ensure that the information is clear to everyone.

Stage 1: GETTING STARTED



Step: Plan the First Steps

Activity Plan the First Steps

(60 minutes)

Goals

- Determine initial responsibility for facilitating and coordinating the team and recording team business.
 - Review and agree on methods for organizing your Collaborative Action Team.
 - Plan the agenda and goals for a meeting of your Collaborative Action Team.
-

Preparation

In Advance

- Read *Conducting Effective Meetings* (Appendix D of the *Creating Collaborative Action Teams Guide*).
- Make copies of handouts and prepare the transparency for this activity.
- Gather the following equipment and materials.

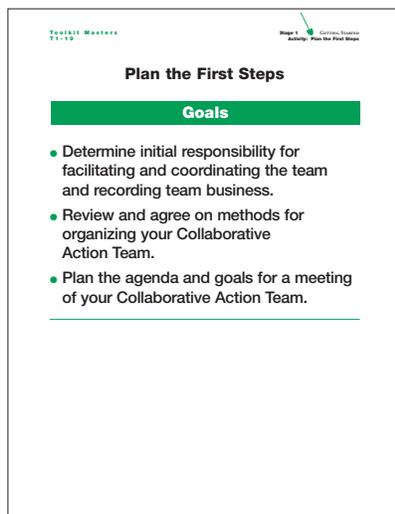
Equipment and Materials

- Overhead projector and screen
- Markers, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.

T1-19



Plan the First Steps

Goals

- Determine initial responsibility for facilitating and coordinating the team and recording team business.
- Review and agree on methods for organizing your Collaborative Action Team.
- Plan the agenda and goals for a meeting of your Collaborative Action Team.

INTRODUCTION *(less than 5 minutes)*

Goals

- This session will help you establish responsibilities of organizing group members and plan a meeting of your Collaborative Action Team. Share the goals of this activity by displaying [Transparency #T1-19](#).

Key Points

- You have gathered information about your school community and discussed factors that could impact the development of your team. Now it is time to determine who will do what prior to the team's next meeting.
- It is important that you plan carefully for the first meetings. You will want to make a good impression on school community members who are invited to attend. By having roles and responsibilities and an agenda clearly defined, you will be prepared to conduct effective team meetings.

H1-9

Toolkit Masters
H1-9

Stage 1  Getting Started
Activity: Plan the First Steps

Organize Your Collaborative Action Team

Read through the following organizational issues. As you do, think about your school community and ask yourself:

- Which of these areas need to be prioritized? Which ones are important to the success of our Collaborative Action Team?
- How formal or informal does our strategy need to be in this area?
- Which areas might be the most challenging to manage? Which ones will be easy?

Remember, each area provides opportunities for shared leadership. The challenge is to share responsibility while keeping organized. Also, have realistic expectations. Every team member (including you) has limited time and many obligations. Your team will probably serve for as long as you would like it to be.

Toolkit Masters
H1-9

Stage 1  Getting Started
Activity: Plan the First Steps

Communicate with Others

What methods will you use to:

- Contact team members between meetings?

- Ensure that team members get advance notice about meetings or events?

- Keep potential members and stakeholders informed about your activities?

- Follow up with people who missed the meeting?

Toolkit Masters
H1-9

Stage 1  Getting Started
Activity: Plan the First Steps

- Track people who attend a meeting or indicate an interest in participating?

- Compare who was invited to participate with who actually came?

- Keep the team's action plan up to date and accurate?

Member Support

What will members need to be able to participate? How will you arrange for the following:

Toolkit Masters
H1-9

Stage 1  Getting Started
Activity: Plan the First Steps

Maintain Accountability

What methods will you use to:

- Ensure that people follow through on their commitments (i.e., Joe said he'd contact a local business to ask for a donation)?

Evaluate Your Progress

What methods will you use to:

- Get feedback on how well your team is functioning?

- Get feedback on how well you are accomplishing team goals?

Coordinate with School District and/or Administration

What methods will you use to:

- Keep the school board informed of your activities?

- Keep the principal and/or superintendent informed of your activities?

INSTRUCTIONS

Step 1 (35 minutes)

Distribute copies of “Organize Your Collaborative Action Team” (Handout #H1-9) and comment that it’s extremely helpful to decide methods for dealing with most of the organizational items on this handout early on. By spending time now planning how you will handle each of the items listed on the “Organize Your Collaborative Action Team” handout, you will save considerable time and effort later on in the collaborative process. Discuss each of the items on this form and determine how you will handle them initially. Once you have additional team members, you may decide to deal with these items differently, but it’s important to have a strategy defined for these areas.

Distribute copies of “Determine Leadership Responsibilities” (Handout #H1-10). Comment that it is also necessary for members of the organizing group to discuss and determine which persons will be responsible for taking on the three major roles listed in this handout. One option is to recruit someone who is not a member of the team to take on the facilitator responsibilities. All other responsibilities, however, should be assumed by members of the team. You may and probably will recruit members of your team to assume some of these responsibilities once the team is fully functioning. *Toolkit Activity: Share Leadership Responsibilities, p. 2-29* addresses how this can be accomplished.

H1-10

Toolkit Masters
H1-10

Stage 1  Getting Started
Activity: Plan the First Steps

Determine Leadership Responsibilities

Listed below are three major categories of responsibilities for leadership that are key to getting your team organized in the beginning. Discuss these responsibilities among members of your organizing group and determine which of you will take initial responsibility for each of these three roles.

Team Coordinator—takes care of logistics and organizational aspects.

- Makes logistical arrangements for meetings, events or activities.
- Organizes team communications and information sharing.
- Distributes necessary documents before meetings (agendas, minutes, handouts, etc.).
- Ensures follow-up on team decisions.
- Monitors the team's progress through the Collaborative Action Team process.
- Monitors the development and use of the team's action plan.
- Makes team materials and resources available to other team members as necessary.

Team Facilitator—supports the Collaborative Action Team process during team meetings and in other group settings.

- Leads meetings and helps the team stick to the agenda (keeping time, staying focused on agenda topics).
- Facilitates team discussions and activities.
- Ensures that all team members have the opportunity to be heard.
- Helps the team build consensus.
- Suggests alternative procedures and methods when the team gets stuck.
- Summarizes decisions made in meetings.
- Deals with conflicts constructively.
- Evaluates how well the team functions collaboratively.
- Remains neutral during team discussions.

Team Recorder—makes sure the decisions and activities of the team are documented and all members remain well informed.

- Creates a record of team activities and decisions.
- Checks with members for accuracy of those records.
- Communicates ideas and information using a variety of techniques (video, audio, written).
- Prepares meeting minutes.
- Takes notes of team discussions on a flipchart.

H1-11

Team Meetings "To Do" List

Before the meeting:

- Discuss goals for the meeting and develop an agenda based on them.
- Determine who will be responsible for each agenda item. Try to include as many people as possible.
- Confirm who will lead which activities and ensure that they have any resources or materials they need.
- Confirm the meeting site and room set-up by phone or in writing.
- Identify equipment and materials needed for the meeting and arrange to get them to the meeting place. Ensure that equipment is working properly.
- Mail meeting notices at least seven days before the meeting. Include minutes of the last meeting and the agenda for next meeting.

At the meeting:

- Agenda, which should include meeting goals.
- Someone assigned to take minutes.
- Sign-in sheet and team membership list with names, addresses, email and phone numbers.
- Names and/or task cards.
- Meeting evaluation forms.

After the meeting:

- Follow up to ensure that volunteers complete the tasks they've taken on.
- Contact members who were not at the meeting and update them.

Step 2 (20 minutes)

Handout #H1-11, "Team Meetings 'To Do' List," is a useful tool whenever you plan a team meeting. It is a checklist of items that need to be accomplished before, during and after each meeting. Review the items on this checklist as you plan an agenda for your next meeting. Try to pick a time and date for your meeting that you feel will be most convenient for all four membership categories on the team. Please refer to a sample agenda format (Handout #H1-12) as a guide for determining the agenda for your meeting. Examples of two types of meeting evaluation forms (Handouts #H1-13 and #H1-14) are also available for you to copy and use. These handouts are also useful for planning subsequent meetings.

H1-12

Agenda Format for Collaborative Action Team Meetings

Place: _____
Date: _____
Time: _____

Meeting Goals

- Goal 1: _____
- Goal 2: _____

| Item | Time | Person Responsible |
|--|---------|--------------------|
| Welcome, review agenda & meeting goals | 5 min. | |
| Conduct icebreaker exercise | 15 min. | |
| Hear reports from members on tasks done | 5 min. | |
| Discuss topics/conduct activities | 45 min. | |
| Summarize key decisions & determine next steps/actions | 10 min. | |
| Set goals and agenda for next meeting | 5 min. | |
| Conduct meeting evaluation | 5 min. | |

Timekeeper: _____ Recorder: _____ Translator: _____

It is also helpful to monitor the ongoing progress of your Collaborative Action Team. The "Collaborative Action Team Development Checklist" (Handout #H1-15) is a useful tool for you to use to keep track of implementing the steps in the five stages of the Collaborative Action Team process. Please keep this checklist available as you continue to plan the implementation of this process.

H1-13

Collaborative Action Team Meeting Evaluation Form #1

Facilitator(s): _____
Meeting Date: _____

Please rate your level of agreement with each statement (circle your response).

| | STRONGLY DISAGREE | DISAGREE | NEUTRAL | AGREE | STRONGLY AGREE |
|---|-------------------|----------|---------|-------|----------------|
| 1. I was prepared for the meeting. | 1 | 2 | 3 | 4 | 5 |
| 2. People openly expressed their opinions and ideas. | 1 | 2 | 3 | 4 | 5 |
| 3. I actively listened to what others had to say. | 1 | 2 | 3 | 4 | 5 |
| 4. I was satisfied with the team's decisions. | 1 | 2 | 3 | 4 | 5 |
| 5. I was able to stay focused on agenda items. | 1 | 2 | 3 | 4 | 5 |
| 6. The facilitator(s) ran the meeting well. | 1 | 2 | 3 | 4 | 5 |
| 7. I was clear about who would do what assignments at the next meeting. | 1 | 2 | 3 | 4 | 5 |

Comments/Suggestions: _____

H1-14

Collaborative Action Team Meeting Evaluation Form #2

Facilitator(s): _____
Meeting Date: _____

List below specific examples of what you feel went well (above) during this Collaborative Action Team meeting. Also list what you feel didn't go so well (below).

| Pluses | Minuses |
|--------|---------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Additional Suggestions: _____

H1-15

Collaborative Action Team Development Checklist

Check off each step as your team completes it. Remember, the steps may not follow the same order for every team.

Stage 1: Getting Started

- Introduce the Process: We have introduced the Collaborative Action Team process to all stakeholders.
- Gather School Community Information: We have defined our school community and gathered information and data related about it.
- Plan the First Steps: We have organized our Collaborative Action Team and have taken the first steps for conducting effective meetings.

Stage 2: Mobilizing the Team

- Establish Representative Membership: We have members who represent the school, home, community and students.
- Determine Communication Ground Rules: We have determined communication ground rules.
- Build Common Understanding: We have discussed issues and looked for common ground.
- Support Consensus Decision Making: We reach consensus when making decisions.
- Identify School Leadership Opportunities: We understand the concept of shared leadership and

Stage 3: Taking Action

- Develop Strategies: We have developed strategies to address each goal.
- Determine Necessary Tasks: We have determined necessary tasks for each strategy, assigned responsibilities and determined timelines.
- Establish Evaluation Methods: We have established methods to evaluate our team's process and outcomes.
- Monitor Progress: We have monitored progress and recognized members' contributions.
- Expand Network Opportunities: We have investigated and taken advantage of opportunities to expand our collaborative network.

Stage 4: Reviewing and Refining

- Assess Team Effectiveness: We have assessed our team's effectiveness.
- Celebrate Your Successes: We have taken time to celebrate our successes.
- Increase Effectiveness and Impact: We have identified areas for improvement and made plans to address them.

WRAP-UP *(less than 5 minutes)*

Key Points

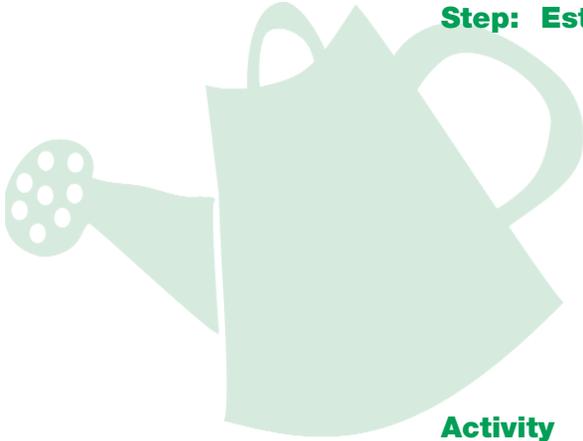
- This activity is important for clarifying methods and responsibilities of organizing team members as you plan for the implementation of your team and specifically your first meeting.
- Monitoring the implementation of the Collaborative Action Team process will help you keep track of the steps you have completed in the five stages of this process.

FOLLOW-UP

- Make sure those who agreed to take on specific tasks related to planning the team meeting follow through.
- Check to make sure that each individual who agreed to take on a role or responsibility at the team meeting will be there and is comfortable with their assigned role.

Stage 2: MOBILIZING THE TEAM

Step: Establish Representative Membership



Activity

Define Your Representative Membership

(70 minutes)

Goals

- Develop understanding and appreciation for a representative membership.
 - Define a representative membership that reflects your school community.
 - Develop strategies for recruiting new members.
-

Preparation

In Advance

- Prepare transparencies for this activity.
- Take 4 flipchart sheets and write the following titles on each: “School Representatives,” “Home Representatives,” “Community Representatives” and “Student Representatives.”
- Divide the School Representatives flipchart sheet into 5 columns labeled: “Name,” “School,” “Teacher,” “Administrator” and “Support Staff.”
- Divide the Home Representatives flipchart sheet into 2 columns labeled: “Name” and “School.”
- Divide the Community Representative flipchart sheet into 2 columns labeled: “Name” and “Organization.”
- Divide the Student Representatives flipchart sheet into 2 columns labeled: “Name” and “School.”
- Gather the following equipment and materials.

Equipment and Materials

- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
 - Provide flipchart sheets, markers and masking tape for each group.
 - Place the 4 flipchart sheets with the columns and headings at the front of the room.
-

T2-1

Toolkit Masters
T2-1


 Stage 2 Mobilizing the Team
 Activity: Define Your Representative Membership

Define Your Representative Membership

Goals

- Develop understanding and appreciation for a representative membership.
- Define a representative membership that reflects your school community.
- Develop strategies for recruiting new members.

INTRODUCTION *(less than 5 minutes)*

Goals

- This session will help your Collaborative Action Team identify potential team members representing school, home, community and students. Share the goals of this activity by displaying [Transparency #T2-1](#).

Key Points

- The Collaborative Action Team process emphasizes recruitment of a broadly representative membership.
- Your membership will reflect the makeup of the community in which your team operates.
- The membership will include a balance of school, home, community and student representatives.

T2-2

Toolkit Masters
T2-2


 Stage 2 Mobilizing the Team
 Activity: Define Your Representative Membership

Representative Membership

What is it?

The team includes a wide range of people from all parts of the school community. Team members represent school, home, community and students. The team includes people of different ages, ethnicities, languages and income levels.

Why is it important?

The team will take action in a way that is:

- Comprehensive
- Respectful of differences
- Understanding of all viewpoints
- Supported by the whole school community

INSTRUCTIONS

Step 1 *(5 minutes)*

Share the definition of representative membership by displaying [Transparency #T2-2](#).

Step 2 *(10 minutes)*

Lead the whole team in a discussion that identifies individuals, organizations and institutions that connect to students and their families in your school community.

Sample questions to lead this discussion:

- Who has been in the media lately advocating for students and their families?
- Who addresses issues (before the school board, city council, etc.) concerning students and their families?
- Who focuses on students and their families as part of their mission?
- Who is most affected by the school or district's programs and policies?
- Who affects the school or district's programs the most?

Write the answers to these questions in the appropriate column on the flipchart sheets.

Step 3 (10 minutes)

Ask team members to write their names and the organizations or schools they represent on the appropriate flipchart sheet at the front of the room. (Remember: Ask team members to select a primary role they represent on the Collaborative Action Team—*school, home, community or student*—even if they can represent more than one.)

Step 4 (10 minutes)

Lead the team in identifying membership categories where no individual names or not enough names are listed. For example, if only a few of the names represent parents or if recreation centers are a community category but no one represents one, the team will need to correct these imbalances.

Identify gaps on the flipchart sheets as you discuss them.

Remind team members that the goal is to balance team membership to reflect a cross section of the community.

Step 5 (10 minutes)

Divide team members into small groups of 5–7 people. Have each small group discuss the gaps in the lists and decide who should be recruited to fill them. Have the small groups list those organizations or individuals on their flipchart sheet.

Step 6 (10 minutes)

Have each small group present its list to the entire Collaborative Action Team. When all groups have reported, help the whole group reach consensus about who will be asked to join the team.

Consolidate the group lists into one list for each membership category.

Step 7 (10 minutes)

Lead the discussion until you have created a strategy for recruiting the new members. This strategy should include the names of team members and what they commit to do to recruit new members. It should also indicate the timeline they will follow for recruitment efforts. Keep the lists from this activity to measure progress in building a representative membership.

WRAP-UP (less than 5 minutes)**Key Points**

- This activity has helped identify the rich diversity of people within your team and your community. The team can involve these people to improve results for students and their families.
 - Ask team members to report on their efforts to recruit new members at the next meeting. It is crucial to follow through on this commitment.
 - Each team member must understand his or her particular responsibility for the recruitment strategy. Explain that you will follow up on this activity by sending everybody a reminder that lists their individual responsibilities.
-

FOLLOW-UP

Write your recruitment strategy, listing the following:

- People to be recruited
- Who will recruit them
- How they will recruit them
- When the recruiting will be done

Mail or email the list to all team members. Include a brief information sheet about the team to share with recruits. Remind them to come prepared to report on their efforts at the next meeting.

Stage 2: MOBILIZING THE TEAM

Step: Establish Representative Membership



Activity **Build Your Representative Membership**

(45 minutes)

Goals

- Build a representative membership.
 - Follow up on the recruitment strategy developed in *Toolkit Activity: Define Your Representative Membership*.
-

Preparation

In Advance

- Prepare the transparency for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Sticky stars or other peel-off stickers
- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheets, markers and masking tape for each group.
- Post the four flipchart sheets with the proposed recruits you listed during *Toolkit Activity: Define Your Representative Membership*, p. 2-1.

T2-3

Toolkit Masters
T2-3

Stage 2 Mobilizing the Team
Activity: Build Your Representative Membership

Build Your Representative Membership

Goals

- Build a representative membership.
- Follow up on the recruitment strategy developed in the *Toolkit Activity: Define Your Representative Membership*.

INTRODUCTION (*less than 5 minutes*)

Goals

- This meeting will help your team follow up on the previous activity. You will continue building a representative membership that includes school, home, community and student representatives.
- Share the goals of this activity by displaying [Transparency #T2-3](#).

Key Point

- Remind the team that you're trying to fill gaps in current membership to make your Collaborative Action Team more representative of the school community. Point out the four lists of proposed new members.

INSTRUCTIONS

Step 1 (10 minutes)

Review the strategy proposed in *Toolkit Activity: Define Your Representative Membership, p. 2-1*. Discuss the related activities you plan to use for recruitment. Ask recruiting members to report their progress to the whole team.

Have team members who recruited new members introduce the new members. Ask the new members to share the following:

- Who they are and/or what organization they represent
- Why they are interested in being on the team
- What the recruiter did or said to recruit them

Have each new team member stick a star in the appropriate column by their name. After all new members have been introduced, lead the team in a round of applause to welcome the newcomers.

Step 2 (5 minutes)

Guide an informal evaluation process by asking the following question and writing responses on a flipchart:

What recruitment approaches did new team members find effective?

Step 3 (10 minutes)

Lead the team in identifying membership categories where gaps still exist. Highlight gaps on the four flipchart sheets as you discuss them. Ask the following question and write the answers on a new flipchart sheet:

What did we learn from the recruiting approach we took and how can we modify our strategy to recruit new members more successfully?

Step 4 (15 minutes)

If team members are not yet in small groups, divide them into groups of 5–7 members. Have small groups work together to identify new strategies for building a representative membership based

on answers in the discussion. After five minutes, have a spokesperson from each group present the group's ideas to the whole team. When all groups have reported, help the team reach consensus about what strategy the team will use to continue building a representative membership. This strategy should include the names of current team members and the specific tasks they agree to do as part of the strategy.

WRAP-UP *(less than 5 minutes)*

Key Points

- This exercise helps team members continue to build a representative membership.
 - During this activity, team members engaged in evaluation and practiced reaching consensus for successful team building and planning.
 - Encourage members to follow up by doing what they've committed to do. Tell them they'll be asked to report on their progress at future meetings.
-

FOLLOW-UP

- Write a list of new recruitment strategies and ensure that all members receive it before the next meeting.
- Ask team members to report on their recruiting efforts at future meetings. Continue to engage the team in evaluating strategies and processes being used to recruit new members. Improve your strategies based on this evaluation. Ensure that members have an opportunity to share what is working and what is not throughout the recruitment process.

Stage 2: MOBILIZING THE TEAM

Step: Determine Communication Ground Rules



Activity **Determine Communication Ground Rules**

(45 minutes)

Goals

- Determine ground rules for communication among team members.
 - Practice consensus-building skills.
-

Preparation

In Advance

- Prepare transparencies for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Sticky stars or other peel-off stickers
- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheets, markers, masking tape and stars or other stickers for each group.

Note to facilitator: If the team is struggling to identify communication ground rules, it's helpful to provide some ideas that other teams have used. However, don't allow the team to depend on you to supply all of the ideas. With this in mind, refer to the sample list of communication ground rules in the background information for this activity in the [Guide, p. 2-7](#).

T2-4

Toolkit Masters
T2-4

Stage 2 Mobilizing the Team
Activity: Determine Communication Ground Rules

Determine Communication Ground Rules

Goals

- Determine ground rules for communicating among team members.
- Practice consensus-building skills.

INTRODUCTION *(less than 5 minutes)*

Goals

- Tell team members this activity will help them agree on basic ground rules for communicating during meetings and in general as they work together. Share the goals of the activity by displaying [Transparency #T2-4](#).
- Tell team members that you'll reach these goals through small and large group activities and discussion.

Key Point

- The first step to working effectively as a team is to determine communication ground rules.

T2-5

Toolkit Masters
T2-5

Stage 2 Mobilizing the Team
Activity: Determine Communication Ground Rules

Communication Ground Rules

What are they?
 Rules of behavior and interaction that team members agree on and use to conduct meetings, manage discussions, share ideas and reach consensus.

Why are they important?
 To establish effective methods of interaction among members that make it possible for them to work together productively.

T2-6

Toolkit Masters
T2-6

Stage 2 Mobilizing the Team
Activity: Determine Communication Ground Rules

Consensus-Building Skills

What are they?
 The ability of team members to:

- Discuss issues
- Listen to each other
- Address differences and conflicts
- Work to resolve them
- Reach decisions based on general agreement

Why are they important?
 To ensure that decisions reflect feedback, input and commitment from the whole team.

INSTRUCTIONS

Step 1 (5 minutes)

Share the definition of communication ground rules by displaying [Transparency #T2-5](#).

Emphasize the importance of everyone having a say in how the team will communicate. Collaborative Action Teams use consensus decision making. Remind team members that one of the four core concepts of the Collaborative Action Team process is consensus decision making. Explain that you will practice consensus-building skills throughout the team’s lifetime. Display [Transparency #T2-6](#).

Step 2 (10 minutes)

If team members are not yet in small groups, divide them into groups of 5–7 members.

Have each small group develop a list of ground rules for effective communication and write them on a flipchart sheet. Then have each group prioritize the list by placing a star by those items the group considers “essential” to collaboration.

Step 3 (20 minutes)

Have a spokesperson from each small group present the group’s list of ground rules to the whole team, including items designated as essential. Post each list on the wall for all to see.

Ask everyone to look for common themes and related items in the lists. Lead the team in developing a master list of ground rules that restates these common themes.

Have the team continue discussing the items on the lists until you’ve covered all items and agreed on your ground rules.

Step 4 (5 minutes)

Ask for a volunteer to develop a poster version to display at each meeting. (If no one volunteers, ask a specific member to perform this task.)

WRAP-UP *(less than 5 minutes)*

Key Points

- Every team needs effective communication in order to be productive.
- Communication ground rules help develop effective communication.
- Your team needs communication ground rules and consensus-building skills throughout the Collaborative Action Team process. You should revisit your team's communication ground rules periodically and modify them as needed.

FOLLOW-UP

- Ensure that the meeting minutes include the final list of ground rules and that all members receive it.
- Follow up with the person who volunteered to develop a poster version to display at future meetings.

Stage 2: MOBILIZING THE TEAM

Step: Build Common Understanding



Activity Build Common Understanding

(95 minutes)

Goals

- Develop team members' discussion skills.
 - Begin to develop respect, trust and understanding among team members.
 - Increase understanding of school community issues.
-

Preparation

In Advance

- Make copies of handouts and prepare transparencies for this activity.
- Recruit several team members to facilitate small group discussions. You'll need one facilitator for each group of 5–7 members. Ask each facilitator to review [Handouts #H2-1](#) and [H2-2](#) and become familiar with the suggested tips before this session.
- Gather the following equipment and materials.

Equipment and Materials

- Tent cards or Post-it Notes
- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Place tent cards or Post-it notes labeled with representative roles (“School,” “Home,” “Community,” “Student”) on tables to create seating for mixed discussion groups.
- Provide flipchart sheets, markers and masking tape for each group.
- Post communication ground rules for all to see.

Note to facilitator: [Handout #H2-2](#) introduces several questions for discussion. The team will probably not have time to discuss all five during the time allowed. You may want to select one or two questions for this session and schedule a series of discussion sessions to talk about the others.

H2-1

Toolkit Master
Stage 2 Mobilizing the Team Activity: Build Common Understanding

Tips for Facilitating Discussions

1. Don't lecture. You should talk less than anyone on the team.
2. Stimulate and moderate the discussion by asking questions, identifying key points and managing the group process.
3. Don't interrupt your personal views.
4. Cultivate the voice of diversity by encouraging all representative groups to share their views.
5. Be friendly, sensitive, understanding and supportive.
6. Don't try to be the most knowledgeable person on the team, but be the best prepared.
7. Don't back off from the discussion. Be in harmony with it by encouraging participation and then slipping into the background when you're not needed to maintain the discussion's momentum.
8. Have courage to be imperfect and risk making mistakes.

Adapted from *Planning Community-Wide Study Circle Programs*, Study Circles Resource Center, Topfield Foundation, Inc., 1996.

H2-2

Toolkit Master
Stage 2 Mobilizing the Team Activity: Build Common Understanding

School Stories

Show your personal experiences and perspective about schools. Listen to others as they share their own stories. Use the following questions to provide some starting points for discussion.

1. Take a trip down memory lane and think about the way things were when you were in school. What did you enjoy about school? What did you dislike? (For students, what is school like for you today? What do you like and dislike?)
2. How do you think today's schools differ from the schools you attended? (For students, how do you think today's schools differ from the schools your parents attended?)
3. What is your idea of a good education?
4. What do you think are the most important challenges facing schools in our school community? What strengths do our schools and community have to meet these challenges?
5. What kind of relationships do our schools have with parents, businesses, health and social agencies, the faith community and other sectors of the school community? How can we better communicate with each other and work together?

Adapted from *The Busy Citizen's Discussion Guide: Education in Our Communities*, Study Circles Resource Center, Topfield Foundation, Inc., 1995.

T2-7

Toolkit Masters T2-7

Stage 2 Mobilizing the Team Activity: Build Common Understanding

Build Common Understanding

Goals

- Develop team members' discussion skills.
- Begin to develop respect, trust and understanding among team members.
- Increase understanding of school community issues.

INTRODUCTION *(less than 5 minutes)*

Goals

- Explain that this activity will give team members an opportunity to share personal experiences and/or viewpoints about schools. Explain that this helps set the tone for future discussions by providing all team members with a better sense of “who we are” and “why we care about our school community.” It will also give the team an opportunity to find out what concerns and opinions team members share. This is the first step in identifying issues your team would like to address. Share the goals of this activity by displaying [Transparency #T2-7](#).

Key Points

- Open discussion provides all team members an opportunity to share their perspectives about issues of concern to your team. This promotes a deeper understanding and respect for all team members.
- People often have a greater commitment to address issues after participating in a structured discussion.
- Once you’ve built trust through discussion, people are more inclined to support consensus decision making and shared leadership—two core concepts of the Collaborative Action Team process.

T2-8

Toolkit Masters T2-8

Stage 2 Mobilizing the Team Activity: Build Common Understanding

Characteristics of Dialogue

1. Reach deeper understanding of an issue by focusing on the values that underlie opinions.
2. Work through difficult issues by talking about the choices your school community or team is facing.
3. Seek “common ground,” not necessarily consensus at this point.
4. Talk without a specified outcome in mind—decisions come later.
5. Work with the goal of deliberation.

Adapted from Planning Community-Wide Study Circle Programs. Study Circles Resource Center, Topsfield Foundation, Inc., 1996.

INSTRUCTIONS

Step 1 *(5 minutes)*

Review basic characteristics of dialogue by displaying [Transparency #T2-8](#).

Step 2 *(5 minutes)*

Remind team members about the communication ground rules they’ve agreed to follow (see *Toolkit Activity: Determine Communication Ground Rules, p. 2-11*). Review your ground rules if necessary.

Explain the responsibilities of discussion participants by displaying [Transparency #T2-9](#). Leave Transparency #T2-9 up throughout the discussion.

T2-9

Toolkit Masters T2-9

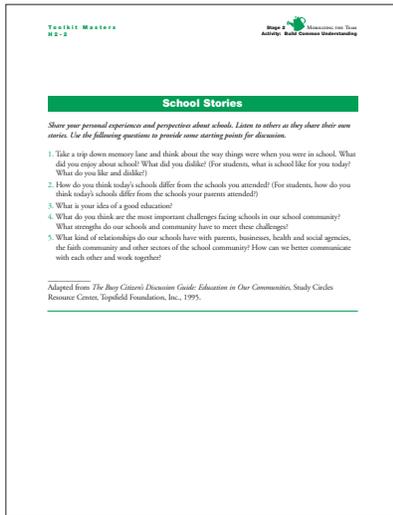
Stage 2 Mobilizing the Team Activity: Build Common Understanding

Responsibilities of Discussion Participants

1. Understand that dialogue is talking without reaching a decision.
2. Share your views.
3. Listen respectfully to others.
4. Maintain an open mind.
5. Help keep discussions on track.
6. Disagree respectfully when your views differ from those of others.
7. Respect confidentiality of discussions.

Adapted from Planning Community-Wide Study Circle Programs. Study Circles Resource Center, Topsfield Foundation, Inc., 1996.

H2-2



Step 3 (40 minutes)

Distribute **Handout #H2-2** and ask team members to read it. If team members are not yet in small groups, divide them into groups of 5–7 members. Tell them they may have time to discuss only one or two of the questions. It is not important to answer all five questions during the time allowed. Begin the discussion in small groups. Have each group facilitator listen and take notes on a flipchart sheet while paying close attention to recurring themes. Ask that someone act as timekeeper for each group.

Step 4 (10 minutes)

Have each group facilitator wrap up the discussion by reporting their notes to the group to check for accuracy. Have each facilitator make revisions as suggested by group members and ask for a spokesperson to report to the whole Collaborative Action Team.

Step 5 (15 minutes)

Ask each group spokesperson to report to the larger team the common themes that emerged in the group discussion.

Summarize the key points that came out during the reports. Explain that you will refer back to these themes as you begin to develop the team's action plan.

Step 6 (10 minutes)

Ask the team to come up with ideas about how they might use this type of activity for a community-wide series of discussions. Suggest that one activity the team might organize at a later date is hosting discussions like this.

Ask for volunteers to write up discussion notes for the team to use in future activities. Remind the team to keep the comments made in these discussions confidential to maintain an atmosphere of trust. The notes should contain only general themes that emerged, not specific comments or names.

WRAP-UP (10 minutes)

Reinforce the importance of trust and respect for others on the team. Emphasize that today's discussions demonstrated that people with different experiences and perspectives also have many of the same concerns and goals. Explain that similar discussion sessions may be planned during future meetings, especially when differences of opinion about a particular topic arise.

Key Points

- To work as a team, team members must maintain an atmosphere of mutual respect and understanding of each others' perspectives and viewpoints.
- Open discussion supports the Collaborative Action Team core concepts of shared leadership and consensus decision making.
- The team will be most effective if they concentrate on issues most team members care about—where they share common ground.

FOLLOW-UP

- Watch for opportunities to organize discussions on other topics of interest to your team or to the larger school community. For instance, your team could host a series of discussions about school leadership when the school district is in the process of hiring a new superintendent.

Stage 2: MOBILIZING THE TEAM

Step: Support Consensus Decision Making



Activity **Examine Team Decisions¹**

(65 minutes)

Goals

- Examine how the team typically makes decisions.
- Explore different decision-making methods.

¹ Adapted from *The Encyclopedia of Team-Development Activities*, J. William Pfeiffer, (Ed.) San Diego: University Associates, 1991.

Preparation

In Advance

- Make copies of handouts and prepare transparencies for this activity. Make one copy of Handout #H2-5 as a transparency as well as a handout.
- Gather the following equipment and materials.

Equipment and Materials

- Blank pieces of paper for all team members
- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Post communication ground rules for all to see.
- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.

INTRODUCTION *(less than 5 minutes)*

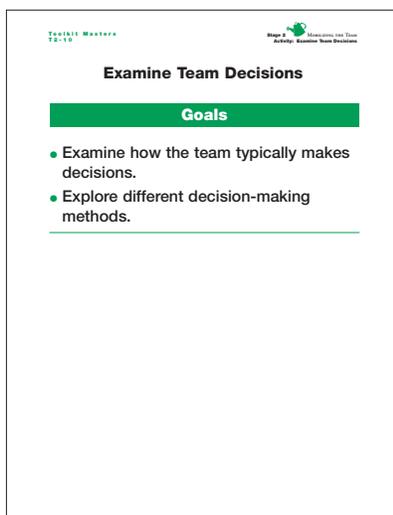
Goals

- Share the goals for this activity by displaying [Transparency #T2-10](#).

Key Points

- Consensus decision making is an essential skill for effective collaboration among people with diverse interests, backgrounds and experience.
- This session examines the methods your team uses to make decisions. Although there are numerous ways to do this, consensus decision making is preferred in the Collaborative Action Team process.

T2-10



Toolkit Masterpiece  Stage 2 Mobilizing the Team
Activity: Examine Team Decisions

Examine Team Decisions

Goals

- Examine how the team typically makes decisions.
- Explore different decision-making methods.

H2-3

Team Decisions Information Sheet

One of the most important questions regarding decision making is "Who actually decides?" From answers to this question, the following five decision-making processes can be clearly identified:

- Individual decision.** One person, normally the leader, actually makes a decision. Others involved in the situation are expected to abide by it.
- Minority decision.** A few of those involved in the situation meet to consider the matter. They make a binding decision for all concerned.
- Majority decision.** More than half of those involved in the situation make a binding decision for all concerned. Many political and democratic organizations use this principle.
- Consensus decision.** An entire group considers a problem on the basis of reason and discussion, with each member expressing a view. The group reaches a decision that all members can accept, regardless of how satisfied they are with it. (No "majority-rule" voting, bargaining or averaging is allowed.)
- Unanimous decision.** Each person fully agrees on the action to be taken, and everyone concerned fully subscribes to the decision they make.

When people are involved in making a decision, they're much more likely to support the decision than if some other person or group makes the decision for them. Therefore, going up the decision-making scale (from individual decision to unanimous decision) increases commitment. However, it also increases the difficulty of arriving at an agreement.

INSTRUCTIONS

Step 1 (10 minutes)

Have team members read [Handout #H2-3](#). Lead a short discussion on the contents of the sheet and answer any questions team members might have.

Step 2 (10 minutes)

Have team members read [Handout #H2-4](#). Discuss the instructions and answer any questions. Ask each person to complete the checklist independently and to please supply honest responses. Tell team members they don't need to write their names, and ensure them that responses will remain anonymous.

H2-4

Team Decisions Checklist

Instructions: Think about the ways in which your team typically makes decisions. Then read each of the statements below. Circle the three statements most typical of your team.

- When decision making is necessary, a few team members usually get together and handle it.
- The school administration usually decides, and the question is settled.
- All team members are encouraged to express their views before the decision is made.
- We attempt to include something for everyone in the decision.
- We frequently let the majority rule.
- The person in charge of the task makes the decision.
- Often, all team members agree on a decision and support it wholeheartedly.
- A small inner circle of people run things in our team.
- We make a decision only when most team members agree on a particular course of action.
- We don't make a decision until every team member agrees to support it completely.
- Our team members are allowed to air their views, but our leader makes the decision.
- A few team members usually dominate the team.
- We don't make a decision unless every team member can accept it to some extent.
- We require a numerical majority before we make a decision.
- We don't make a decision until every team member actively supports it.

Step 3 (5 minutes)

Have team members read [Handout #H2-5](#). Discuss the instructions and answer questions. Ask each person to complete the chart. Tell the team that this should also be anonymous.

Step 4 (10 minutes)

Choose a person to collect all completed Team Decisions Interpretation Charts ([Handout #H2-5](#)). Have this person add up the Total Circles for each row and record the result on a transparency of the chart ([Transparency #T2-11](#)). The row with the highest overall Total Circles indicates the most typical decision-making style according to your team members.

During this step, your team may take a short break or have a discussion about the activity so far.

H2-5/T2-11

Team Decisions Interpretation Chart

Instructions: In the first column, circle the numbers of the statements you chose on the previous handout. Count the number of circles on each row and write the total in the second column. (Be sure to count your circles, not the numbers inside the circle.) The style with the highest number of "Total Circles" represents your team's typical decision-making style.

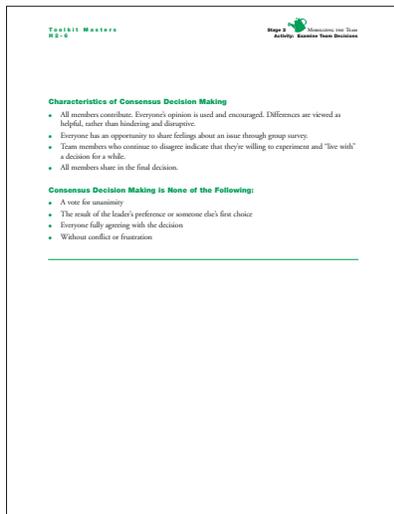
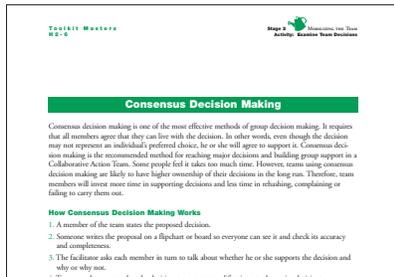
| Statement Numbers | Total Circles | Representative Style |
|-------------------|---------------|----------------------|
| 2, 6, 11 | | Individual |
| 1, 8, 12 | | Minority |
| 4, 9, 14 | | Majority |
| 3, 4, 13 | | Consensus |
| 7, 10, 15 | | Unanimous |

Step 5 (10 minutes)

Display [Transparency #T2-11](#) with the results of the survey written in. Lead a discussion on how the most typical styles have affected your team's decisions to this point. If consensus decision making didn't emerge as the most typical style, discuss why team members felt it didn't.

Identify the reasons given and post them on a flipchart.

H2-6



Step 6 (15 minutes)

Lead a discussion on how to overcome these objections or barriers to consensus decision making. Have team members read [Handout #H2-6](#) and lead a discussion reviewing ideas on consensus decision making. Identify some actions you could take at future meetings to ensure that consensus decision making succeeds. Ask volunteers to be responsible for monitoring the use of these actions and to report back at future meetings.

WRAP-UP (less than 5 minutes)

Key Points

- When people are involved in making a decision, they're more likely to commit to carrying it out. For this reason, all team members should consider the problem or issue at hand and provide their point of view.
- Consensus decision making is the preferred process for making decisions in a team setting. Although it might increase the difficulty of arriving at an agreement, it greatly increases team members' commitment to carry out decisions.

FOLLOW-UP

- ☐ Ensure that those who volunteered to monitor the use of consensus decision making understand what they need to do. If necessary, follow up on this by meeting to discuss actions to take in this area.

Stage 2: MOBILIZING THE TEAM

Step: Support Consensus Decision Making



Activity

Use Consensus Decision Making

(70 minutes)

Goal

- Practice discussion skills needed for consensus decision making.
-

Preparation

In Advance

- Prepare transparencies for this activity.
- Ask several team members to assist you in facilitating small group discussions for this activity.
- Have the small group facilitators review [Handout #H2-1](#) from *Toolkit Activity: Build Common Understanding, p. 2-15*. Ask them to become familiar with the suggested tips for facilitating discussions before this activity. Ask each facilitator to review [Handout #H2-7](#) and become familiar with the brainstorming process before this session.
- Gather the following equipment and materials.

Equipment and Materials

- Tent cards or Post-it notes
- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Place tent cards or Post-it notes labeled with representative roles (“School,” “Home,” “Community,” “Student”) on tables to create seating for mixed discussion groups.
- Provide flipchart sheets, markers and masking tape for each group.

H2-7

Toolkit Masters
H2-7

Stage 2 Mobilizing the Team
Activity: Use Consensus Decision Making

Brainstorming Guidelines

Brainstorming is a commonly used term for creative thinking. It's often helpful to break a Collaborative Action Team into small groups to discuss an issue or question. Brainstorming is one of the most popular small group techniques because it's simple to use, it takes little time and materials, and it's quite effective. You can use brainstorming whenever your team needs to form a list of ideas about an issue or to come up with responses to a question.

The purpose of brainstorming is to get as many ideas possible out on a given question or issue. You tap team members' creativity without stopping to discuss or judge the worth of anything that comes up. It's helpful to have a well-defined and clearly stated problem or question to which people can respond. Brainstorming takes 15 to 30 minutes, depending on the size of the small group and the complexity of the question. The ideal group size for brainstorming is five to eight persons. Use the first 10 to 15 minutes for forming and recording ideas from each small group. Use the balance of the time to eliminate duplications and prioritize items. Have someone in each group record ideas on a flipchart sheet as they come up. This should be done without any comments about their appropriateness or lack thereof. If a group reaches a stopping point, enjoy the silence, since the best ideas often come afterwards.

There are four rules for brainstorming you should post or give to team members.

- List all the ideas—the more the better. Don't hold back any ideas, even if they seem silly at the time.
- Don't discuss ideas as they're being formed.
- Don't judge ideas. All ideas are welcome.
- Reiterations are okay. Encourage people to build on others' ideas.

After the allotted time for forming ideas is past, have each small group facilitator review the items. Then have each small group identify and either eliminate or combine any duplicates. Next, have a spokesperson for each group report back to the whole team with either the group's entire list or its top three to five. Groups should use consensus decision making to select these items. The group then reaches a decision everyone can accept, regardless of how satisfied they are with it. Post the top three to five items from each small group.

Finally, take action to address the issue. If the issue is simple, this may mean simply assigning responsibility for carrying out a decision. If the decision will require multiple actions, assign a group of volunteers to develop an action plan to address it. Another option is to plan a separate meeting with everyone involved to develop goals and strategies for action.

T2-12

Toolkit Masters
T2-12

Stage 2 Mobilizing the Team
Activity: Use Consensus Decision Making

Use Consensus Decision Making

Goal

- Practice discussion skills needed for consensus decision making.

INTRODUCTION *(less than 5 minutes)*

Goal

- Share the goal for this activity by displaying [Transparency #T2-12](#).

T2-13

Toolkit Masters
T2-13

Stage 2 Mobilizing the Team
Activity: Use Consensus Decision Making

Requirements for Reaching Consensus

- Everyone's active participation
- Expression and resolution of differences
- Decisions for the good of the team
- Consideration of everyone's opinion and viewpoint

Key Points

- A Collaborative Action Team provides a forum through which people from all backgrounds and experience can use their collective wisdom to address school community issues. Your team should ensure that all members are heard in the process of reaching consensus.
- Review the basic ideas of consensus building by displaying [Transparency #T2-13](#).
- The team practiced discussion—the groundwork that leads to consensus—in *Toolkit Activity: Build Common Understanding, p. 2-15*. Introduce the discussion skills needed for building consensus by displaying [Transparency #T2-14](#).
- Explain that the next exercise will help the team practice consensus-building skills.

T2-14

Toolkit Masters
T2-14

Stage 2 Mobilizing the Team
Activity: Use Consensus Decision Making

Discussion Skills Needed for Consensus

The ability of team members to:

- Discuss issues
- Listen to each other
- Address differences
- Work to resolve differences and conflicts
- Reach decisions based on general agreement

INSTRUCTIONS

Step 1 (20 minutes)

If team members are not yet in small groups, divide them into groups of 5–7 members. Ask team members to reflect on the following questions by displaying [Transparency #T2-15](#). These questions will give the team an opportunity to use consensus decision making.

Have assigned facilitators lead the small groups in brainstorming answers to these questions. Have them write ideas on a flipchart sheet as they are voiced, without discussing them.

T2-15

Toolkit Masters
T2-15

Stage 2 Mobilizing the Team
Activity: Use Consensus Decision Making

A Strategy for Successful Meetings

- How can we make our Collaborative Action Team meetings more efficient and productive?
- What strategy can we develop to ensure that everybody contributes to successful meetings?

Step 2 (15 minutes)

After brainstorming, ask each small group to select one idea and/or to combine their ideas into one. This single idea should be one your team could pursue in a relatively short timeframe, given the team's current resources. Make sure facilitators give everybody an opportunity to voice their thoughts.

Once each small group has reached consensus, have the groups prepare a proposal that includes a rationale and suggestions for how their idea might be achieved.

Step 3 (10 minutes)

Ask each small group to present the group's proposal.

Step 4 (15 minutes)

Ask the whole team for comments and recommendations regarding the proposals. Lead a team discussion to reach consensus on which proposal to follow, reminding team members of the characteristics of consensus decision making. Put [Transparency #T2-13](#) back on the overhead.

Step 5 (5 minutes)

When the whole team has reached a decision, congratulate them! Tell them they have just worked through one of the most potentially daunting aspects of the Collaborative Action Team process. Then ask for a group of volunteers to coordinate the use of the proposed strategy for more successful meetings.

WRAP-UP (less than 5 minutes)

Key Points

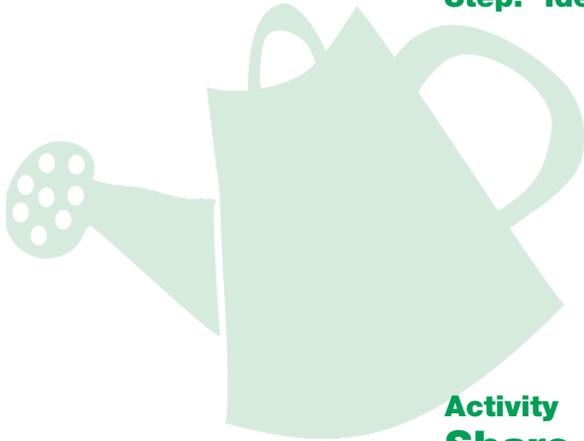
- This exercise has helped team members practice consensus-building skills.
- The team will find many more opportunities for building consensus and may adapt these activities to meet those situations.
- Thank the members who volunteered to coordinate the use of the strategy for more successful meetings.

FOLLOW-UP

- Ensure that the members who volunteered meet to plan how this strategy will be used. Ask them to be ready to report at the next meeting.

Stage 2: MOBILIZING THE TEAM

Step: Identify Shared Leadership Opportunities



Activity Share Leadership Responsibilities

(60 minutes)

Goals

- Identify opportunities for your team to share leadership responsibilities.
 - Develop a process for sharing leadership responsibilities.
 - Give team members an opportunity to volunteer for leadership responsibilities.
-

Preparation

In Advance

- Make copies of handouts and prepare the transparency for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Clear transparency, overhead pens
- Overhead projector and screen
- Markers, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.

T2-16

Toolkit Masters
T2-16
Stage 2 Mobilizing the Team
Activity: Share Leadership Responsibilities

Share Leadership Responsibilities

Goals

- Identify opportunities for your team to share leadership responsibilities.
- Develop a process for sharing leadership responsibilities.
- Give team members an opportunity to volunteer for leadership responsibilities.

INTRODUCTION *(less than 5 minutes)*

Goals

- Share the goals of this activity by displaying [Transparency #T2-16](#).

Key Points

- The Collaborative Action Team process emphasizes shared leadership among all team members. Your members should see themselves as a community of leaders working to benefit students and their families.
- Tell team members this activity will help the team identify the diverse opportunities the team offers for shared responsibility.
- Throughout this activity, members will have an opportunity to volunteer for different leadership responsibilities.

H2-8

Collaborative Action Team Leadership Responsibilities

Match the appropriate letter to the group or person that tends to fulfill each responsibility based on your observations of your team:

A - principal/central office H - parents/other relatives
T - teachers/school staff C - community representatives
S - students

Manual Member Responsibilities—responsibilities that all Collaborative Action Team members have at all times:

_____ Contributing ideas, concerns and information

_____ Monitoring the team's progress through the Collaborative Action Team process

_____ Monitoring the development and use of the team's action plan

_____ Making team materials and resources available to other team members as necessary

Facilitating Responsibilities—responsibilities that support the Collaborative Action Team process when the team is in meetings or in other group settings:

_____ Leading meetings and helping the team stick to the agenda (keeping time, staying focused on agenda topics)

_____ Facilitating team discussions and activities

_____ Ensuring that all team members have the opportunity to be heard

_____ Helping the team build consensus

_____ Suggesting alternative procedures and methods when the team gets stuck

_____ Summarizing decisions made in meetings

_____ Dealing with conflicts constructively

_____ Evaluating how well the team functions collaboratively

Recording Responsibilities—responsibilities that ensure that team decisions and activities are documented and that all members remain well informed:

_____ Creating a record of team activities and decisions

_____ Checking with members for accuracy of those records

_____ Communicating ideas and information using a variety of techniques (video, audio, written)

_____ Preparing meeting minutes

_____ Taking notes of team discussions on a flipchart

H2-9

Collaborative Action Team Shared Responsibilities

Add the name of the volunteer and the length of time that they will be responsible to the appropriate column.

| Coordinating Responsibilities | Who Will Do It? | For How Long? |
|---|-----------------|---------------|
| Handling logistics—meeting space, refreshments, etc. | | |
| Organizing team communications and information | | |
| Distributing documents prior to meetings | | |
| Ensuring follow-up on decisions | | |
| Maintaining progress throughout the Collaborative Action Team process | | |
| Monitoring the development and use of the action plan | | |
| Making team materials and resources available | | |
| Facilitating Responsibilities | Who Will Do It? | For How Long? |
| Leading meetings | | |
| Facilitating discussions | | |

| Recording Responsibilities | Who Will Do It? | For How Long? |
|--|-----------------|---------------|
| Recording activities and decisions | | |
| Checking the accuracy of records with members | | |
| Communicating information, using a variety of techniques | | |
| Preparing meeting minutes | | |
| Taking notes on flipcharts | | |

INSTRUCTIONS

Step 1 (10 minutes)

Ask team members to read [Handout #H2-8](#). Explain that team members need to take care of these responsibilities in the Collaborative Action Team setting. They are grouped into four categories.

Ask team members to fill out [Handout #H2-8](#).

Step 2 (15 minutes)

After members have completed the handout, ask the following questions and provide feedback accordingly:

What group or persons, if any, tend to dominate leadership responsibilities?

What groups or persons, if any, are noticeably absent from team leadership responsibilities?

Discuss what may result when a single person or membership group handles all responsibilities (“burnout,” loss of creativity, etc.). Discuss the value of building leadership capacity within the school community by including representatives from all membership categories.

Step 3 (15 minutes)

Have team members read [Handout #H2-9](#). Tell them it lists the facilitating, coordinating and recording responsibilities that team members need to share. Ask if other responsibilities are missing and add any suggestions to the handout.

Lead the team in a discussion to decide on a process for dividing the responsibilities among team members. For example, your team might assign responsibilities for a specific period—three months, six months, one year—or you might rotate them on a monthly basis. Your team can rotate responsibilities by membership category or on a volunteer basis.

Step 4 (15 minutes)

Once your team has reached a decision about a process for sharing responsibility, lead the team in assigning the responsibilities listed on [Handout #H2-9](#). Use this new process as you do so. Ask for volunteers if necessary. Write each team member's name next to the responsibility he or she agrees to fulfill. Refer to [Handout #H2-8](#) to ensure that a variety of groups and people are assigned to the different responsibilities.

Thank those who agree to take on responsibilities and let them know that the lead person in their responsibility category—facilitator, coordinator or recorder—will contact them.

WRAP-UP (less than 5 minutes)

Key Points

- This activity helped identify the variety of leadership responsibilities available in your Collaborative Action Team and how you can divide them among team members.
 - Shared leadership spreads responsibilities among all members and provides everyone with an opportunity to develop leadership skills. This in turn increases the leadership pool in your school community.
-

FOLLOW-UP

- Prepare a copy of [Handout #H2-9](#), listing all responsibilities and who will fulfill them. Ensure that all members receive a copy of the list.
- Ensure that the lead facilitator, coordinator and recorder contact their volunteers to explain their responsibilities and what needs to be done for the next meeting.
- Do something at the next meeting to recognize and encourage those who volunteered to take on responsibilities.

Stage 2: MOBILIZING THE TEAM

Step: Identify Shared Leadership Opportunities



Activity **Take on Leadership Roles**

(65 minutes)

Goals

- Help team members recognize their personal strengths.
 - Identify ways to encourage team members to use their personal strengths in leadership roles within the team.
-

Preparation

In Advance

- Make copies of handouts and prepare transparencies for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Pads of large Post-it notes
- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheets, markers and masking tape for each group.
- Provide 2 pads of Post-it notes for each table.

INTRODUCTION *(less than 5 minutes)*

Goals

- Tell Collaborative Action Team members this session will help them develop ways to encourage team members to recognize their personal strengths and to use them for leadership roles. Share the goals for this activity by displaying [Transparency #T2-17](#).

Key Points

- Share the importance of encouraging members who haven't had leadership positions before to recognize their personal strengths. This will increase their confidence for taking on leadership roles.
- Emphasize that all team members play a key role in nurturing a supportive learning environment. This will help team members experience success when taking on leadership roles and responsibilities.

T2-17

TEACHING TOOLKIT Stage 2 MOBILIZING THE TEAM
Activity: Take on Leadership Roles

Take on Leadership Roles

Goals

- Help team members recognize their personal strengths.
- Identify ways to encourage team members to use their strengths in leadership roles within the team.

INSTRUCTIONS

Step 1 (15 minutes)

If team members are not yet in small groups, divide them into groups of 5–7 members. Have team members read [Handout #H2-10](#). Introduce related questions by displaying [Transparency #T2-18](#). Ask team members to keep these questions in mind as they read. Leave [Transparency #T2-18](#) up.

H2-10

Toolkit Masters
H2-10

Stage 2  Mobilizing the Team
Activity: Take on Leadership Roles

A Parent Named Dora Martínez

Several months had gone by since this group initiated a Collaborative Action Team to increase parent involvement in schools. The team felt that by increasing parent involvement, they could help with drug and alcohol abuse, teen pregnancy and domestic violence. The team was stuck in a rut and needed to spark up some momentum. Only two parents had consistently attended meetings for the past four months. The team was scheduled to make a presentation before the school board that night and give a progress report.

Lost in thought, I didn't notice when Dora Martínez walked in. She tapped me softly on the shoulder to get my attention, then greeted me and said, "You wanted parents? You got more parents!" Stepping aside, Dora motioned for a new group of parents to come forward. She introduced them—right to left, including her husband! It was a turning point in the development of our Collaborative Action Team.

The team meeting resumed with an air of excitement provided by the voice of the team's Mexican immigrant newcomers. They provided a rare and timely perspective to consider in planning for the school board presentation. Dora emerged as a natural leader in this session, and the parents looked to her for guidance.

Toolkit Masters
H2-10

Stage 2  Mobilizing the Team
Activity: Take on Leadership Roles

In the case of Dora, the Collaborative Action Team had provided a nurturing environment for personal growth and leadership development. Dora left her nursing career in Mexico and came to the U.S. with her husband and family in search of a better life. She has a quiet disposition that some confuse with passivity. Once you get to know her, though, you find that she's a natural grassroots organizer. Dora firmly believes in community collaboration to benefit students and their families, no matter what side of the border they're on.

Throughout this event, Dora showed her personal strengths in several areas of leadership: being a risk-taker, a visionary, a team builder and even a negotiator. To this day, Dora continues to be involved on the Collaborative Action Team and mentors other parents along the way.

T2-18

Toolkit Masters
T2-18

Stage 2  Mobilizing the Team
Activity: Take on Leadership Roles

A Parent Named Dora Martínez

1. What personal strengths did Dora bring to the team initially?
2. What potential barriers to becoming involved did Dora face?
3. How did Dora overcome the barriers?
4. How can we support each other to use our personal strengths in leadership roles?
5. How can we eliminate barriers?

After they've read the handout, ask team members to discuss the questions from the transparency in small groups and write their answers on a flipchart.

Step 2 (10 minutes)

Have small groups report on their responses to questions #4 and 5 on [#T2-18](#). Have a recorder summarize the responses on a flipchart sheet. Tell the team you will refer back to these notes later.

Step 3 (5 minutes)

Ask the small groups to distribute the Post-it notes on their tables among each person in the group. Have one person from each group write the following phrase at the top of a flipchart sheet:

I have these strengths and will be glad to use them to help our team:

T2-19

Strengths

- I have creative ideas.
- I'm good at planning kids' parties.
- I have a great sense of humor.
- I listen to others before I make a decision.
- I'm good at getting things done when someone tells me what to do.
- I have strong opinions and ideas about how to improve things.

Explain that a “strength” is something you’re naturally good at. A strength may be any ability, skill, personality trait or experience that makes you unique. Show them examples for this activity by displaying [Transparency #T2-19](#).

Ask team members to think about their responses to the phrase. In other words, what are their own personal strengths? Have them write each strength on a separate Post-it note with their name. Then have them post the notes on their small group flipchart sheet.

Give them about 90 seconds to fill out the Post-it notes.

Step 4 (10 minutes)

Have team members read [Handout #H2-11](#). It lists the strengths-based leadership roles a Collaborative Action Team needs. Explain that members play these roles according to their personal strengths. Successful teams include people with a diverse set of strengths who can fulfill all of these roles. Share the examples for this activity by displaying [Transparency #T2-20](#).

H2-11

Strengths-Based Collaborative Action Team Leadership Roles

Communicator—helps everyone understand the message

Consensus Builder—helps a group of people talk with one another so they can make a decision that all members can support

Evaluator—pays attention to detail and helps the team evaluate and reflect on decisions and activities

Implementer—follows through on decisions and gets things done

Mediator—helps people understand each other

Mentor—helps people lead activities and advises them on how to improve

Planner—thinks about what's needed to make things happen

Resource Developer—finds what's needed to make things happen

Risk Taker—tries new ideas and approaches

Team Builder—helps people feel like they're part of the team

Visionary—shares dreams about making things better and leads people to make these dreams come true

Ask each small group to match the strengths posted on their flipchart to the roles where those strengths apply. Have them write the matching role on the Post-it note. Ask the small groups to start out by discussing at least one Post-it note per person. Then ask them to keep going around. If a posted strength doesn't match any role on the handout, have the group consider additional roles.

Step 5 (10 minutes)

Have each small group report to the whole team the strengths and matching leadership roles present in that group.

T2-20

Strengths and Leadership Roles

- I have creative ideas:
Resource Developer
- I'm good at planning kids' parties:
Planner
- I have a great sense of humor:
Mediator, Team Builder
- I listen to others before I make a decision:
Consensus Builder
- I'm good at getting things done when someone tells me what to do:
Implementer
- I have strong opinions and ideas about how to improve things:
Visionary

Step 6 (10 minutes)

Lead a discussion by focusing on the diversity of strengths reported in this activity. Tell team members each strength represents an opportunity to enhance the team's leadership. Each person can assume a leadership role in his or her area of strength. Refer back to the flipchart list summary of responses to questions #4 and 5 ([Transparency #T2-18](#)) generated in Step 2. This is a list of ways team members can support each other to use their strengths for leadership roles. Ask team members to share any other ideas they have for supporting each other to take on leadership roles.

Ask a group of volunteers to develop a brief, written document that summarizes the suggestions given. Also have them develop a brief document that lists the strengths members bring to the team and matches them with leadership roles. Use the Post-it notes from the activity to do this. Have them bring these documents to the next meeting.

WRAP-UP *(less than 5 minutes)*

Key Points

- A variety of leadership roles are important for a successful Collaborative Action Team. They come naturally to people when the roles are in their areas of strength.
 - Collaborative Action Teams should serve as a place where people develop confidence in their personal strengths and use them to benefit the team.
 - As members assume leadership roles based on personal strengths, they practice shared leadership and help the team move forward.
-

FOLLOW-UP

- Ensure that the volunteers collect all of the Post-it notes with the strengths and matching roles. Follow up with them to ensure that they have everything they need to summarize the suggestions for supporting members as they take on leadership roles.

Stage 2: MOBILIZING THE TEAM

Step: Identify Shared Leadership Opportunities



Activity **Develop Leadership through Mentoring**

(60 minutes)

Goal

- Learn how team members can mentor each other to create an environment where members develop new strengths and take on new leadership roles.
-

Preparation

In Advance

- Make copies of handouts and prepare transparencies for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheets, markers and masking tape for each group.

INTRODUCTION *(less than 5 minutes)*

Goals

Tell Collaborative Action Team members this session will help them use mentoring. Mentoring is one way to encourage team members to develop new strengths and take on new leadership roles and responsibilities. Share the goal for this activity by displaying [Transparency #T2-21](#).

Key Points

- The diversity found within your team brings talents, skills and experiences that will help develop new leadership.
- The visibility of shared leadership within your team increases as more team members take on new roles and responsibilities.
- Leadership shared by school, home, community and student representatives provides others with role models they can identify with. These people may inspire other members to become more involved.
- The next activity will help your team begin finding ways to encourage team members to take on new roles through mentoring each other.

T2-21

Toolkit Masters
T2-21

Stage 2  MOBILIZING THE TEAM
Activity: Develop Leadership through Mentoring

Develop Leadership through Mentoring

Goal

- Learn how team members can mentor each other to create an environment where members develop new strengths and take on new leadership roles.

T2-22

Collaborative Action Team Mentors...

Share their life experience, knowledge and skills with others to promote personal and/or professional growth.

This expands and enhances the overall leadership available to your Collaborative Action Team.

INSTRUCTIONS

Step 1 (5 minutes)

Share the definition of a mentor by displaying [Transparency #T2-22](#).

Explain that mentors are positive role models in our lives who help us learn. Like a gardener who cares for planted seeds, a mentor helps us grow by example and through personal attention. Mentors can be relatives, friends, teachers, neighbors, students or other people in the community who make a difference in our lives.

Mention that all members of the Collaborative Action Team can become mentors and guide each other by sharing personal experiences, knowledge and skills. Explain how mentoring each other enhances the overall leadership pool for the team and the school community.

Step 2 (5 minutes)

Have team members read [Handout #H2-12](#) and respond to the items individually.

Step 3 (10 minutes)

If the team is not yet in small groups, divide it into groups of 5–7 members. Have the small groups discuss their individual responses to the handout. As people share their ideas, have them list on a flipchart all qualities mentioned about mentors.

Step 4 (15 minutes)

Point out that all members of the team are “gardeners” who help each other learn from working together. Remind them that each of us has something to teach and something to learn.

Ask team members to consider how the team helps them teach and learn from one another. Have small groups read, discuss and respond to [Handout #H2-13](#). Ask each group to take notes on a flipchart sheet.

Step 5 (10 minutes)

Have a spokesperson from each small group present a summary of the group’s responses to questions #1–3. As presentations are

H2-12

Gardeners

In responding to the following items, think about people in your school, home and community who have inspired and guided you. These are people who helped prepare you for good times and bad times. They are role models that still linger in your memory as important to your personal and/or professional growth.

In your school

My mentor: _____ Relationship: _____
Why is this person special and what did you learn from this mentor?

In your home and family

My mentor: _____ Relationship: _____
Why is this person special and what did you learn from this mentor?

In your community

My mentor: _____ Relationship: _____
Why is this person special and what did you learn from this mentor?

H2-13

Tilling the Soil and Planting the Seeds

Think of how your Collaborative Action Team helps members teach and learn from one another. As a small group, respond to the following questions. Ask someone in the group to write your responses on the flipchart.

1. What about our team encourages people to teach and learn from each other?

2. What barriers exist for members to teach and learn from each other?

3. How can the team encourage members to develop the mentor qualities we identified earlier so that we can teach and learn from each other?

4. What might you be able to teach others on the team?

5. What do you need to learn from others on the team?

conducted, have a person designated as recorder for this step listen for common responses in the reports and write them on a flipchart sheet. Note especially the responses to question #3.

Step 6 (10 minutes)

After all groups have presented, lead a discussion on how to develop a strategy for mentoring within the team. It should address the team's current barriers to teaching and learning from each other. Decide whether the team wants to set up a mentoring system within the team, or whether they prefer an informal structure.

Ask for a group of volunteers to refine the strategy discussed and make a presentation at the next meeting. Ask them to collect everybody's [Handout #H2-13](#) and use the responses to questions #4 and 5 to find out mentoring needs and resources within the team. In other words, what can people teach and what would people like to learn?

WRAP-UP (less than 5 minutes)

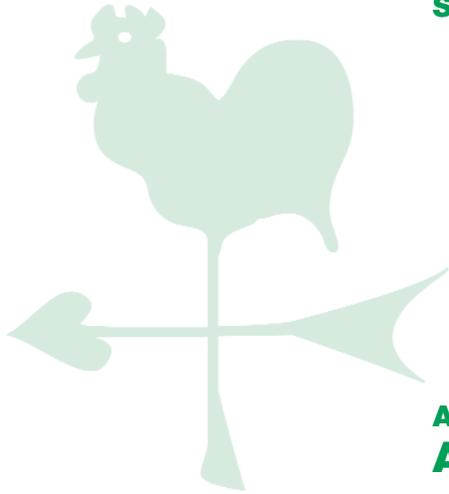
Key Points

- The Collaborative Action Team process provides many opportunities for members to learn from each other. Mentoring can be one way to ensure that members are learning from each other.
- A learning environment based on trust encourages people to take on and practice new roles and responsibilities.

FOLLOW-UP

- Ensure that those who volunteered understand what they need to do for the next meeting. Help them with any ideas and resources they may need.
- Suggest that the volunteers develop a list of members and what they indicated they can teach and would like to learn (questions #4 and 5 on [Handout #H2-13](#)). This encourages members to contact each other individually for mentoring according to their specific needs. It also helps all team members understand the variety of resources available within the team.

Stage 3: SETTING DIRECTION



Step: Agree on a Vision

Activity Agree on a Vision

(65 minutes)

Goal

- Develop a common vision of the future for students and their families in your school community.
-

Preparation

In Advance

- Prepare transparencies for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 participants. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheets, markers and masking tape for each group.

Note to facilitator: If you don't have enough time to complete your vision in one meeting, complete Steps 1–4 with everyone present. Then ask a representative from each group to volunteer for a task force to work on one statement (Step 5). Complete Step 6 at the next regular meeting.

T3-1

Toolkit Masters T3-1

Stage 3  Setting Direction
Activity: Agree on a Vision

Agree on a Vision

Goal

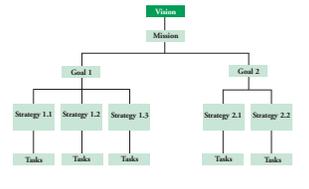
- Develop a common vision of the future for students and their families in your school community.

T3-2

Toolkit Masters T3-2

Stage 3  Setting Direction
Activity: Agree on a Vision

Collaborative Action Team Action Plan Overview



```

graph TD
    Vision --> Mission
    Mission --> Goal1
    Mission --> Goal2
    Goal1 --> Strategy1.1
    Goal1 --> Strategy1.2
    Goal1 --> Strategy1.3
    Goal2 --> Strategy2.1
    Goal2 --> Strategy2.2
    Strategy1.1 --> Task1.1
    Strategy1.1 --> Task1.2
    Strategy1.2 --> Task1.3
    Strategy1.3 --> Task1.4
    Strategy2.1 --> Task2.1
    Strategy2.2 --> Task2.2
    
```

INTRODUCTION *(less than 5 minutes)*

Goal

- Share the goal of this activity by displaying [Transparency #T3-1](#). Explain that you'll accomplish this goal through discussions in small groups and with your whole team.

Key Points

- Agreeing on what you want for students and their families will keep team members focused on why the team exists. It is the first step in the action planning process. Display [Transparency #T3-2](#).
- A vision will give team members a star to steer by. It will provide a way to know when you've achieved your dream.

INSTRUCTIONS

Step 1 (15 minutes)

If team members are not yet in small groups, divide them into groups of 5–7 members. Ask each group to describe what your school community should look like five years from now. Start the discussion with the following statement: *You’ve been in hibernation for five years. You wake up and find your school community has become a model for the nation. What does it look like?*

Provide each group with a flipchart pad. Ask each group to record the group’s descriptions on a flipchart sheet.

Post the sheets for everyone to see. Allow a minute to let them look over the descriptions.

Ask a spokesperson from each group to read the group’s description.

Step 2 (15 minutes)

Ask each small group to consider this statement: *It’s five years from now, and our Collaborative Action Team has become the best it can be. What does it look like?*

Have each group write their descriptions on a flipchart sheet.

Post the flipchart sheets for all to see.

Ask a spokesperson from each group to read the group’s description.

Step 3 (10 minutes)

Next, ask the groups to consider this question: *Your Collaborative Action Team has become highly successful in improving results for students and their families in your school community. There’s even a story in Time magazine about it! What does the story say?*

Again, have each group write their descriptions on a flipchart sheet and share them with the entire team.

Step 4 (10 minutes)

Ask each small group to use the posted information to write a description of your school community five years from now. Show them an example of a vision statement by displaying [Transparency #T3-3](#).

T3-3

Toolkit Masters
T3-3

Stage 3  Setting Direction
Activity: Agree on a Vision

Collaborative Action Team Vision Statement Example

Our school community will be a nurturing and supportive place to work and learn, where all students and families receive the educational opportunities they need to be successful in school and in life.

Post the group vision flipchart sheets for everyone to see. Ask someone from each small group to read the statements.

Step 5 (5 minutes)

Next, ask the whole team to create one statement that best describes what you want. Use all or part of the various group visions. Reach a consensus on your vision through open team discussion.

Step 6 (5 minutes)

Review the draft of the vision and ask for feedback. Then finalize the draft.

WRAP-UP (less than 5 minutes)

Key Points

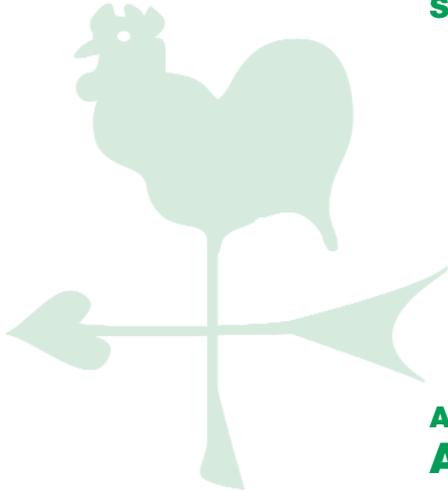
- It's important for team members to have a voice in determining a vision for their school community. This activity allowed everyone to give input on the direction of this vision. People support what they help create. If everyone has a chance to provide input, they're more likely to support the outcome.
- Working together to write a vision statement generates energy and motivation. It also keeps your team focused on why the team exists.

FOLLOW-UP

- Ask members to volunteer to prepare a poster of the vision, using special paper or artwork. Document your vision statement on your action plan (Action Planning [Handout #H-4](#)) and give copies of the vision statement to everyone at the next meeting. Also distribute them throughout your school community.
- Ask representative team members to present the vision to your city council, your school board and other groups interested in student issues to obtain their support.

Stage 3: SETTING DIRECTION

Step: Identify and Prioritize Issues



Activity

Assess Your School Community

(65 minutes)

Goals

- Discuss your school community's assets and needs.
 - Decide on information-gathering methods.
-

Preparation

In Advance

- Make copies of handouts and prepare the transparency for this activity.
- Collect all of the school community information that team members began collecting in Stage 1. Organize it in a way that all team members can understand.
- Gather the following equipment and materials.

Equipment and Materials

- Overhead projector and screen
- Markers, flipchart pad and easel
- Poster of your team’s vision statement

Room Set-Up

- Display the poster of your vision statement.
- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.

T3-4

Toolkit Materials
T3-4
Stage 3 Setting Direction
Activity: Assess Your School Community

Assess Your School Community

Goals

- Discuss your school community's assets and needs.
- Decide on information-gathering methods.

INTRODUCTION *(less than 5 minutes)*

Goals

- Share the goals for this activity by displaying [Transparency #T3-4](#).

Key Points

- You can better identify and prioritize issues when you’ve discussed your school community’s assets and needs.
- If organizations or agencies in your school community have done surveys recently, you don’t need to “reinvent the wheel.” See if you can access this information. If current information isn’t readily available, use this activity to start the process.
- This activity will help you plan for gathering information from a variety of sources and will be used later in the action planning process to develop goals.

INSTRUCTIONS

Step 1 (25 minutes)

Clarify your school community's geographic and political boundaries. (Your team should have done this during *Toolkit Activity: Define Your School Community, p. 1-9.*) Present the school community information that your team has collected so far so that everyone understands it. Make a list of organizations, agencies and businesses that can provide or already provide services to your students and might have additional information you need.

Step 2 (10 minutes)

Set a goal for your own survey based on the available data. What information do you still need? Are you clear about what information you want to gather? What information will answer the questions you'll ask? Will the information you gather influence the priority issues your team chooses?

Step 3 (20 minutes)

Have team members read [Handout #H3-1](#). Then have the team explore methods for information gathering. Discuss the advantages and disadvantages of the four methods listed on [Handout #H3-1](#). Decide how they apply to your school community and team.

Step 4 (5 minutes)

Ask for a group of volunteers representing a cross section of the team to design a survey and develop a plan that includes the following:

- Writing the survey questions
- Recruiting and training volunteers to conduct the survey
- Designing publicity to inform people about the survey
- Tabulating the results of the survey

Ask them to consider the mechanics of surveying on [Handout #H3-2](#).

H3-1

Toolkit Masters
H3-1

Stage 3  Setting Direction
Activity: Assess Your School Community

Information-Gathering Methods

Discuss the advantages and disadvantages listed for each of the following methods. Decide which method might work best for your own survey.

1. **Face-to-face interviewing**
 - a. Most thorough
 - b. Involves training volunteer surveyors
 - c. Takes the most time
2. **Telephone**
 - a. Good for gathering lots of information of many different types
 - b. Involves training volunteer surveyors
 - c. Takes less time than face-to-face interviewing
 - d. May not reach people with no phone
3. **Mailed surveys**
 - a. Works for simple questions with no more than six items
 - b. Economical
 - c. Not necessarily representative of the whole community and return rate is often very low
4. **Captive-audience survey**
 - a. Winsor responses from certain groups, service clubs, business organizations, etc.
 - b. Least expensive and lowest need for surveyor training
 - c. Least likely to produce responses, except from those with vested interest

H3-2

Toolkit Masters
H3-2

Stage 3  Setting Direction
Activity: Assess Your School Community

Mechanics of Surveying

As you plan and develop your survey, remember the following pointers to help it succeed:

1. When writing survey questions:
 - Consider the social, economic and ethnic makeup of your school community.
 - Customize your survey for differences related to rural vs. urban areas.
 - Test the clarity of your survey questions with a few individuals. Then revise the questions, if necessary.
2. When training people to be surveyors:
 - Consider whether you need bilingual surveyors.
 - Provide them with full information about how to conduct the survey.
 - Discuss the survey questions and explain how to record responses.
 - Provide information on routes, times, meeting places, and emergency and safety procedures.
3. When publicizing your efforts to the school community:
 - Clearly describe the purpose and need for your survey.
 - Use a variety of media: newspaper, television, radio, brochures, posters, bulletin board announcements, school newspaper, etc.
4. When tabulating your results:
 - Determine who will tabulate the results.
 - Decide what equipment (computers, printers, copiers) you will use.
 - Decide how results will be shared with others.

WRAP-UP *(less than 5 minutes)*

Key Points

- Obtaining information from residents of your school community helps you select your team's priority issues. Knowing residents' opinions about your school community's assets and needs will help you improve results for students and their families. This activity lays the groundwork for collecting such data.
- Any data collected as part of your school community survey should relate to improving results for students and their families.
- This activity provides an opportunity to develop shared leadership among all representative members. It's a great way to involve students and parents.

FOLLOW-UP

- Assist the volunteers who agreed to write a plan for conducting your survey. Ask them to complete their work and report back to the whole team at the next meeting.
- Ensure that the survey plan is implemented. This could be your first major team project and should be included in your action plan.

Stage 3: SETTING DIRECTION



Step: Identify and Prioritize Issues

Activity

Identify School Community Issues

(75 minutes)

Goals

- Discuss school community issues.
 - Use consensus decision making to prioritize these issues.
-

Preparation

In Advance

- Make copies of handouts and prepare transparencies for this activity.
- Collect any additional school community data that team members have gathered.
- Gather the following equipment and materials.

Equipment and Materials

- Blank pieces of paper or 4 x 6" index cards
- Small peel-off stickers (3 per member)
- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel
- Poster and/or handouts with your team's vision statement

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheets, markers, stickers and masking tape for each group.
- Display the poster of your vision statement.

Note to facilitator: This session is designed for a Collaborative Action Team that has not previously identified issues that team members want to address. If you've already set priorities, modify this activity to review those issues. If you've had a lot of turnover in team membership or you're having trouble getting focused, this activity can help.

INTRODUCTION *(less than 5 minutes)*

T3-5

Toolkit Masters
T3-5


 Stage 3 | Setting Direction
 Activity: Identify School Community Issues

Identify School Community Issues

Goals

- Discuss school community issues.
- Use consensus decision making to prioritize these issues.

T3-6

Toolkit Masters
T3-6


 Stage 3 | Setting Direction
 Activity: Identify School Community Issues

School Community Issues

What are they?

Issues that directly affect the well-being and education of students and their families.

These issues may involve academic, economic, political, social, cultural or historical factors.

Why are they important?

Examining these issues helps members understand differences and similarities in their viewpoints.

Goals

- Share the goals of this activity by displaying [Transparency #T3-5](#).
- Tell team members they will reach consensus on a prioritized list of school community issues. Explain that it's important to identify the issues that team members find most pressing. This process allows everyone to express their own priorities for action. The decision should also be data-driven and build on the information the team has gathered about school community issues.

Key Points

- Identifying school community issues is a key part of the Collaborative Action Team process. Share the definition and importance of these issues by displaying [Transparency #T3-6](#).
- It's important for everybody to express their feelings about the most pressing school community issues. Respect and appreciation for diverse viewpoints builds trust and understanding among team members.
- To be effective, team planning must begin with a sense of direction that becomes more focused as your team matures. A first step in developing an action plan is for each represented group (school, home, community, students) to identify school community issues.

INSTRUCTIONS

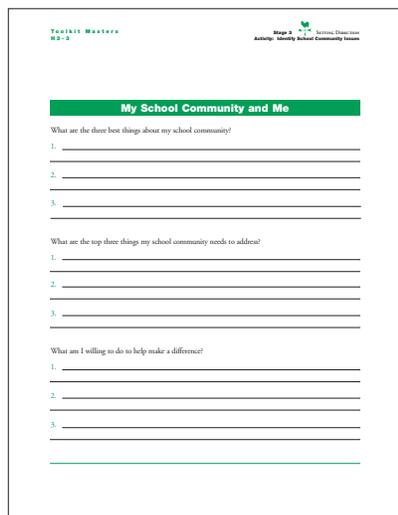
Step 1 *(10 minutes)*

Divide into representative groups (school, home, community, students). Briefly review the results of the school community surveys and information that the team has collected. Give each group member five minutes to write individual responses to the questions on [Handout #H3-3](#).

Step 2 *(10 minutes)*

Have members discuss their individual responses within their representative group.

H3-3



Step 3 (10 minutes)

Have each representative group respond to the same three questions found on [Handout #H3-3](#). Ask the groups to reach consensus and write their answers to each question on separate flipchart sheets.

Step 4 (10 minutes)

Have a spokesperson from each group present the group's answers to the whole team. As presentations are conducted, encourage team members to listen and take notes on [Handout #H3-4](#). Allow a few minutes of reflection between presenters for people to finish writing their thoughts. Keep each group's responses to the second question posted for all to see.

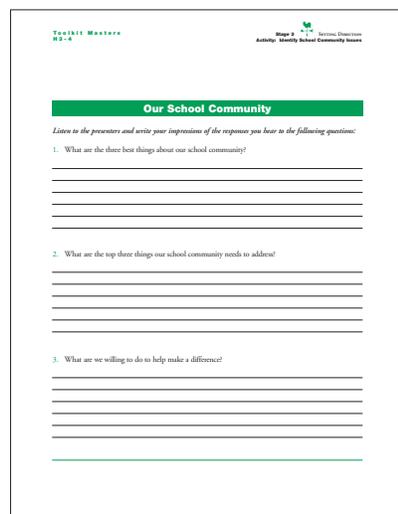
Step 5 (5 minutes)

Celebrate school community strengths that team members have described. Ask people for their overall impressions of what they heard with questions like the following:

What did people say are the best things about our school community?

How did people show their commitment and willingness to help our team work for students and families in the school community?

H3-4



Step 6 (10 minutes)

Post a separate flipchart sheet entitled, "Our Priority Issues," to combine the responses to the second question into a single list. Ask team members to look for overlapping thoughts. Always clarify each statement and ask for input to ensure consensus as you write it. Also add other statements that can't be combined. After your list is complete, ask team members if it reflects all of the issues suggested in response to question #2.

Step 7 (10 minutes)

Ask team members to look over the new list (Our Priority Issues) and to think about the three issues that they think are most important. Have the team consider all of the issues the various groups discussed.

1. Provide each team member with three small peel-off stickers (smilies, stars, etc.).
2. Ask team members to come up to the front individually and show the top three issues of their choice by placing stickers next to them on the list.

3. Once they've indicated their choices, have everyone sit down. Begin a discussion of the three items with the most stickers. Reach a consensus about which item represents the greatest interest or need.

Indicate that all these items will guide the team as you develop a team mission, goals and strategies. After your team completes this process, lead team members in a round of applause. Encourage team members to congratulate each other for the hard work they've accomplished.

WRAP-UP *(less than 5 minutes)*

Key Points

- This session helps team members identify school community issues and creates a common understanding of the differences and similarities in team members' viewpoints. It's important to identify one or two high-priority issues, so team members can address them successfully.
 - Emphasize that this process forms the knowledge base from which you will determine the focus of your team's work. This activity begins to lay the foundation for your team's future action plan. Also indicate that the team will need to continue to examine student achievement data and other indicators of student success and tie them to team priorities.
 - It's also important for team members to understand and agree on the causes of high-priority problems. That way, your team can develop a workable plan for improvements. The *Toolkit Activity: Build Common Understanding, p. 2-15* will help your team achieve greater understanding of these issues.
-

FOLLOW-UP

- The high-priority items your team identified in this activity will become the basis for developing a team mission statement later on. Ask a small group of volunteers to document this list in your action plan. Keep copies available to give to members.
- Ask one or more members to volunteer to develop a poster that lists the prioritized issues. Use this list to explain the needs your Collaborative Action Team has identified to new members and others interested in the team's work.

Stage 3: SETTING DIRECTION



Step: Develop a Mission Statement

Activity Develop a Mission Statement

(70 minutes)

Goals

- Clarify your team's purpose.
 - Develop a mission statement.
-

Preparation

In Advance

- Make copies of the handout and prepare transparencies for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheets, markers and masking tape for each group.
- Post the team’s list of priority issues.
- Post the team’s vision for the future of your school community.

INTRODUCTION *(less than 5 minutes)*

Goals

- Share the goals of this activity by displaying [Transparency #T3-7](#).
- Tell team members you will review the team’s vision for the school community and the priority issues the team already identified. (Refer to outcomes from the *Toolkit Activities: Agree on a Vision, p. 3-1* and *Identify School Community Issues, p. 3-9*.) Finally, you will develop a mission statement to guide your team in improving results for students and their families.

T3-7

Toolkit Masters
T3-7


 Stage 3 • Setting Direction
 Activity: Develop a Mission Statement

Develop a Mission Statement

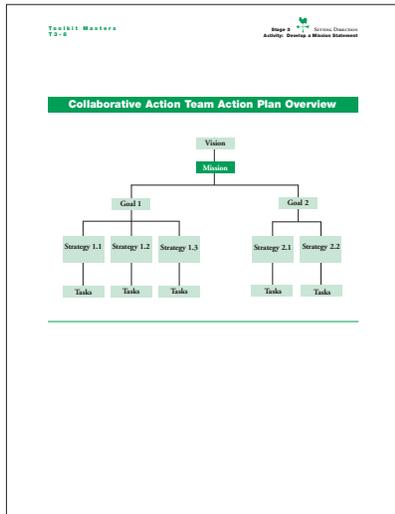
Goals

- Clarify your team’s purpose.
- Develop a mission statement.

Key Points

- Developing a mission statement provides your team with a sense of identity and common direction. A mission statement also helps you describe the purpose of your team to others.
- Point to the posted flipchart sheets. Remind team members that school, home, community and student representatives have defined the most pressing issues they found in the school community. They have shared the team’s vision of the ideal school community. Writing a mission statement will help clarify the team’s understanding of this vision, as well as the issues at hand. While the vision describes your team’s dream, the mission describes your team’s purpose for existing.
- The mission statement provides your team with a general sense of direction. You should therefore review it periodically to make sure you are staying focused.
- This activity will guide your team in developing a team mission statement.

T3-8



INSTRUCTIONS

Step 1 (5 minutes)

If team members are not yet in small groups, divide them into groups of 5–7 members. Tell team members that your mission statement is the second step in the action planning process. (Display [Transparency #T3-8](#).)

Step 2 (5 minutes)

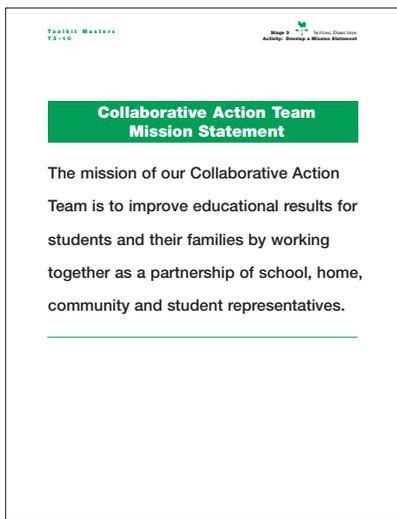
Tell team members that an effective, clear mission will answer some key questions about your team and the team’s purpose. When answered, these questions will help you identify some basic actions to help your team fulfill that purpose. Review the essential parts of a mission statement by displaying [Transparency #T3-9](#). Tell team members they’ll be looking at a sample mission statement to identify whether it answers the three questions essential to a mission statement.

T3-9

The flipchart is titled "Essential Parts of a Mission Statement". It contains three numbered questions:

1. What does your Collaborative Action Team do?
2. For whom do you do it?
3. How do you go about it?

T3-10



Collaborative Action Team Mission Statement

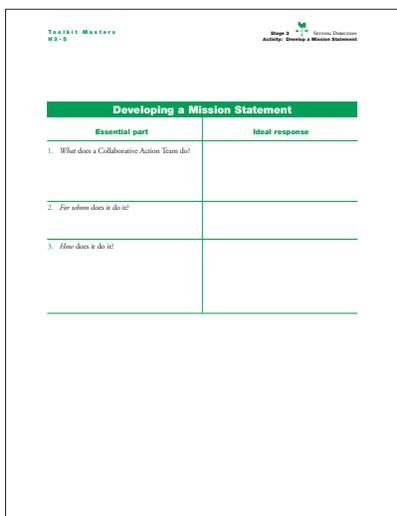
The mission of our Collaborative Action Team is to improve educational results for students and their families by working together as a partnership of school, home, community and student representatives.

Step 3 (10 minutes)

Show an example of a Collaborative Action Team mission statement by displaying [Transparency #T3-10](#) and providing copies of [Handout #H3-5](#). Ask team members to work in small groups to match the italicized phrases in the sample mission statement to the three essential parts of a mission statement described in [Handout #H3-5](#).

Monitor each small group's progress in completing this task. Encourage all team members to contribute and provide feedback as needed. When most groups have completed the task, guide the whole team through a discussion of the process.

H3-5



| Developing a Mission Statement | |
|---|----------------|
| Essential part | Ideal response |
| 1. <i>What</i> does a Collaborative Action Team do? | |
| 2. <i>For whom</i> does it do it? | |
| 3. <i>How</i> does it do it? | |

| Essential part | Ideal response |
|---|---|
| 1. <i>What</i> does a Collaborative Action Team do? | improves educational results |
| 2. <i>For whom</i> does it do it? | for students and their families |
| 3. <i>How</i> does it do it? | by working together as a partnership of school, home, community and student representatives |

Step 4 (15 minutes)

Post your previously developed team vision and priority issues on flipcharts or provide them on handouts. Review them with the team. Tell team members their next task will be to write a draft of a mission statement. It should clearly address these priorities and support the team's vision. Ask them to keep the vision and priority issues in mind while developing a mission statement.

Ask each small group to write a rough draft of a mission statement for your Collaborative Action Team. Have team members answer the questions relating to the essential parts of a mission statement as they write their rough drafts.

Step 5 (15 minutes)

Have each group post their draft mission statement for all to see, with the three essential parts identified. Give team members time to look over the drafts. Tell the team you'll use consensus decision making to refine the phrases that best communicate the essential

parts. Then ask team members to use these phrases to develop one mission statement for the team.

Step 6 *(15 minutes)*

Have the entire team review the mission statement draft. Request feedback about revisions, then finalize the draft. Be sure you reach consensus on the final statement.

Step 7 *(5 minutes)*

After your team has approved the revised mission statement, ask for a volunteer to prepare a poster-size version for display.

WRAP-UP *(less than 5 minutes)*

Key Points

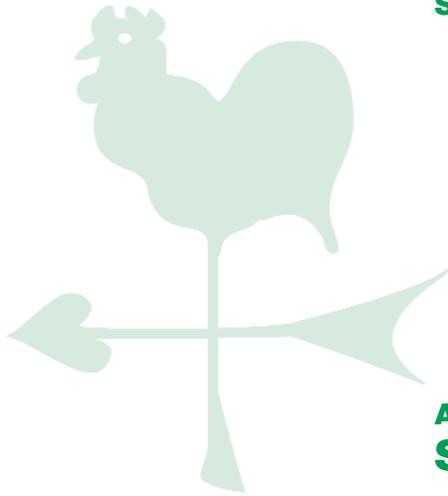
- This activity guided team members through the process of writing a mission statement.
- Emphasize that this mission statement will guide the team's action plan.
- State that team members will review the team's mission statement periodically to maintain a clear direction. These reviews will provide an opportunity to refine and clarify the team's purpose.

FOLLOW-UP

- Ask a task force of team members to present the team's mission statement before the superintendent and the school board. Encourage all team members to attend the board meeting to show their support. This will provide team members who have never attended a school board meeting with an opportunity to attend one.
- Your Collaborative Action Team may want to provide the school board with brief updates about the team's activities periodically. This can increase your school community's awareness about your team, as well as strengthen support from the central office.
- Document your mission statement on your team's action plan and have it available for the next step in the action planning process.

Stage 3: SETTING DIRECTION

Step: Set Team Goals



Activity Set Team Goals

(60 minutes)

Goal

- Set one or more goals for your team's top-priority issue.
-

Preparation

In Advance

- Prepare transparencies for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Blank pieces of paper for all team members
- Team’s mission statement and list of prioritized issues
- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheets, markers and masking tape for each group.
- Post communication ground rules and the team’s vision and mission for all to see.

T3-11

Toolkit Masters
T3-11

Stage 3  Setting Direction
Activity: Set Team Goals

Set Team Goals

Goal

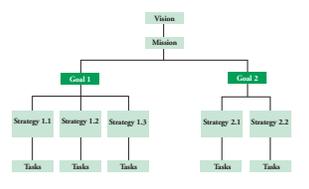
- Set one or more goals for your team's top-priority issue.

T3-12

Toolkit Masters
T3-12

Stage 3  Setting Direction
Activity: Set Team Goals

Collaborative Action Team Action Plan Overview



```

graph TD
    Vision --> Mission
    Mission --> Goal1
    Mission --> Goal2
    Goal1 --> Strategy1.1
    Goal1 --> Strategy1.2
    Goal1 --> Strategy1.3
    Goal2 --> Strategy2.1
    Goal2 --> Strategy2.2
    Strategy1.1 --> Tasks1.1
    Strategy1.2 --> Tasks1.2
    Strategy1.3 --> Tasks1.3
    Strategy2.1 --> Tasks2.1
    Strategy2.2 --> Tasks2.2
    
```

INTRODUCTION *(less than 5 minutes)*

Goal

- Tell team members this activity will help you build on the team’s mission and priority issues. You’ll write one or more goals to address the top priority and discuss it both in small groups and as a whole team. (Display [Transparency #T3-11](#).)

Key Points

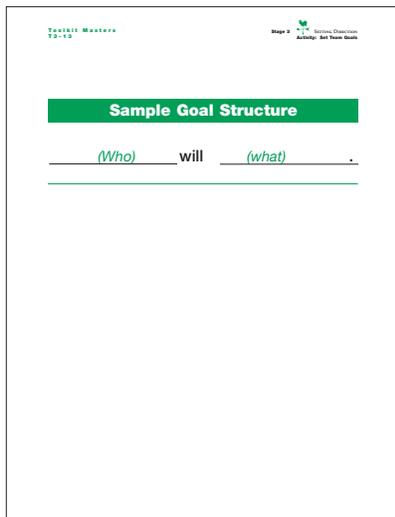
- You’ll write goals to help team members fulfill the team’s mission.
- Goals are the next step for developing your team’s action plan—an essential to fulfill the team’s mission. (Display [Transparency #T3-12](#).)

INSTRUCTIONS

Step 1 (15 minutes)

Post the mission statement and one of your team’s top-priority issues on a flipchart. Tell team members they will work in small groups to develop a goal statement. This goal statement should address what you will do to overcome the problem. If team members are not yet in small groups, divide them into groups of 5–7 members.

T3-13



Toolkit Masters
T3-13

Stage 3  Setting Direction
Activity: Set Team Goals

Sample Goal Structure

 (Who) will (what)

Display [Transparency #T3-13](#) and discuss the structure of a goal statement. Show the goal examples on [Transparency #T3-14](#). Explain that the priority issues addressed on Transparency #T3-14 are “low student achievement, particularly in core subject areas” and “lack of community and parent participation in school improvement.” Ask each group to write a goal statement for the top-priority issue on a flipchart sheet.

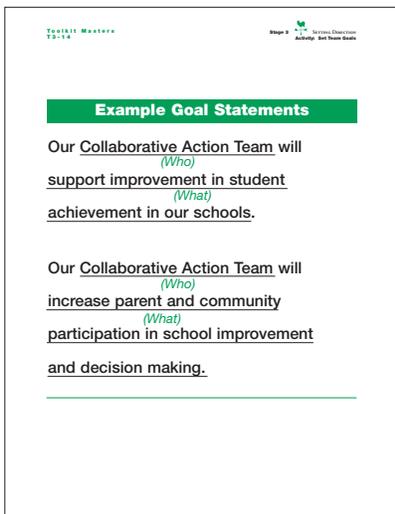
Step 2 (10 minutes)

Post the flipchart sheet containing the goal statements from the small groups. Ask team members to reach consensus on one combined goal statement for the top-priority issue.

Step 3 (15 minutes)

Post your other priority issues on the flipchart. Assign a small group to each priority issue and ask them to develop a goal statement for that issue.

T3-14



Toolkit Masters
T3-14

Stage 3  Setting Direction
Activity: Set Team Goals

Example Goal Statements

Our Collaborative Action Team will support improvement in student achievement in our schools.

Our Collaborative Action Team will increase parent and community participation in school improvement and decision making.

Step 4 (15 minutes)

Ask each group to share their goal statement. Discuss them until the team has reached consensus on a goal statement for each priority issue. In some cases, you may have more than one goal statement for a priority issue, depending on the complexity of the issue.

WRAP-UP *(less than 5 minutes)*

Key Points

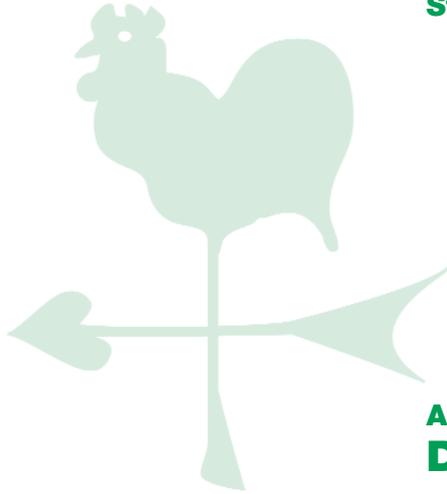
- Developing goals for each priority issue is the next step in developing an action plan. The remaining action planning steps—developing strategies, and determining tasks and timelines—are covered in Stage 4.
- Your team has written goals to address each of the team's priority issues. Your team will now need to determine strategies for accomplishing each goal. The rate and speed at which you accomplish each goal will depend on the complexity of the goal and the availability of people and other resources.

FOLLOW-UP

- Document the goal or goals your team developed in your action plan and have it available for the next part of the action planning process.
- If you weren't able to reach consensus on the team's goals, ask a small group of team members to refine them. Have the group present their ideas to the whole team for approval at a later time.

Stage 3: SETTING DIRECTION

Step: Communicate Your Message



Activity **Define the Audience and the Message**

(75 minutes)

Goals

- Identify the team's target audiences for communications.
 - Define the message your team wants to communicate.
-

Preparation

In Advance

- Prepare transparencies for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Copy of your school community definition from *Toolkit Activity: Define Your School Community, p. 1-9*
- Copy of your team's vision, mission and goals for each group
- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 participants. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipcharts, markers and masking tape for each group.
- Post your team's vision, mission and goals or have copies available for each group.

T3-15

Toolkit *****
Stage 3  SETTING DIRECTION
Activity: Define the Audience and the Message

Define the Audience and the Message

Goals

- Identify the team's target audiences for communications.
- Define the message your team wants to communicate.

INTRODUCTION (*less than 5 minutes*)

Goals

- Share the goals of this activity by displaying [Transparency #T3-15](#).

Key Points

- Tell team members this activity will help them think about ways to communicate who the team is and what the team is doing. The team will be sharing this information with people in the school community and beyond.

INSTRUCTIONS

Step 1 (5 minutes)

If team members are not yet in small groups, divide them into groups of 5–7 members. Remind team members why it's important to inform others about your team's efforts. Such communications will help your team reach its goals. Communications can help your team in the following ways:

- Establish team identity through slogans and visual images.
- Establish team credibility and demonstrate that you are a legitimate group doing positive work.
- Build positive impressions about the overall school community.
- Invite others to support the team's efforts and share in the team's success.

Tell your team the first step in developing a communications plan is to decide what you want to accomplish through your team's communications. At this point, your goal is to share general information about the team with people in your school community and beyond. In the future, your team may want to develop additional plans for specific situations.

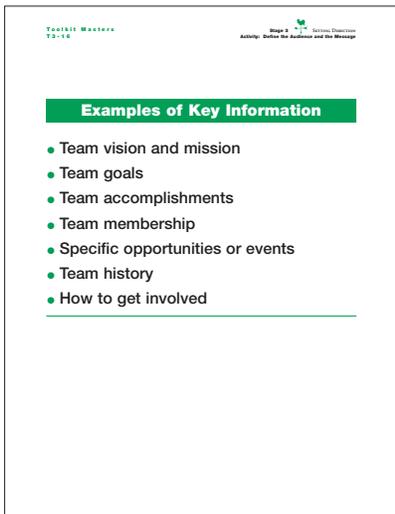
Step 2 (15 minutes)

Remind team members of the team's definition of the school community, developed during *Toolkit Activity: Define Your School Community, p. 1-9*. Emphasize that your school community includes anyone interested in or affected by issues related to your schools.

Ask the team to brainstorm about groups within the school community. Who would *benefit* from knowing about your team or *support* the team if they knew about it? (Some examples are students and taxpayers.) List these groups on a flipchart. Explain that these people form potential audiences for your communications.

Ask the team to think about people outside your school community who should be informed about your team. Again, this might include people who would benefit from knowing about your team. One example might be a state health agency that needs to advertise its services to families in your school community. Another example might be people who could support the team, such as a local foundation or a business needing student interns. Add these names to the list on the flipchart.

T3-16



Examples of Key Information

- Team vision and mission
- Team goals
- Team accomplishments
- Team membership
- Specific opportunities or events
- Team history
- How to get involved

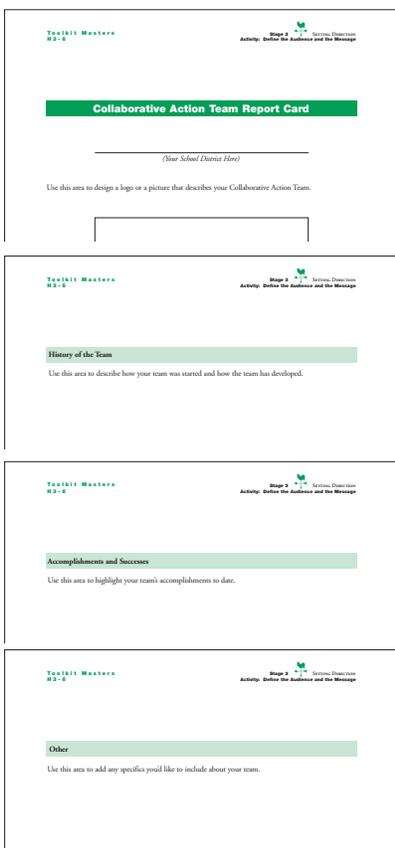
Step 3 (15 minutes)

Explain that you will spend more time thinking about the team’s audience in *Toolkit Activity: Create a Communications Plan, p. 3-31*. Ask team members to think about the information they’d like to share with their audience. Provide examples of some information they might want to include by displaying [Transparency #T3-16](#).

Leave the transparency up and ask team members to discuss the following questions in small groups. Have each group record the answers on a flipchart sheet after the group reaches a consensus.

- *What is the basic information we need to communicate about our team and our efforts?*
- *How do we want people to perceive our team—what message do we want to send?*

H3-6



Collaborative Action Team Report Card

(Your School District Here)

Use this area to design a logo or a picture that describes your Collaborative Action Team.

History of the Team

Use this area to describe how your team was started and how the team has developed.

Accomplishments and Successes

Use this area to highlight your team's accomplishments to date.

Other

Use this area to add any specifics you'd like to include about your team.

Step 4 (20 minutes)

Give each small group a copy of the team’s vision, mission and goals, if these aren’t posted on the wall. Also give them the Collaborative Action Team Report Card ([Handout #H3-6](#)). Ask each small group to supply the information they think your team should communicate. Tell them this is a first draft of the information the team will share with people outside. Have them write the content as they would want it to appear in the final version.

Encourage the groups to keep the following tips in mind:

- Keep information short and to the point.
- Try to think of a “hook”—something that will get people’s attention.
- Tell the story, using specific examples to make the point.
- Be creative and have fun.
- Keep your audience in mind. What’s mostly likely to interest them?

Step 5 *(15 minutes)*

Ask each group to present their draft Report Card to the whole team. After all groups have presented, ask the team to identify similarities among the information the small groups highlighted. This is the key information your team wants to communicate. Ask team members to describe what “jumps out” at them in the materials. Do some items tell the team’s story especially well?

Explain that the ideas the groups developed today will form the basis for the team’s communications materials. Ask for a group of volunteers to develop the ideas based on the Report Card into a brochure or booklet. Encourage students to volunteer or take leadership for this project. Ask the volunteers to present the materials to the team for feedback at a future meeting.

WRAP-UP *(less than 5 minutes)***Key Points**

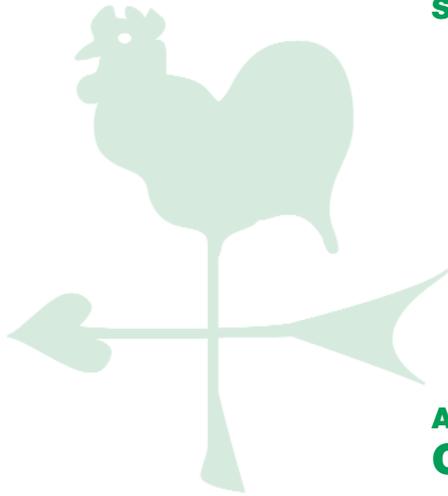
- The materials your team developed today will help you reach your team’s goals by informing your school community and others about the team’s efforts.
 - Your whole team should take responsibility for informing others about the team, since each team member is uniquely qualified to reach a different audience.
-

FOLLOW-UP

- Help the volunteer group complete the Report Card by making sure that they have access to the materials and equipment they need. They may, for instance, need access to computers. Provide examples of communications materials from other organizations if the volunteers aren’t sure how to proceed. Set a date with them to present a draft of the materials for the team’s review.

Stage 3: SETTING DIRECTION

Step: Communicate Your Message



Activity

Create a Communications Plan

(60 minutes)

Goals

- Create a plan for communicating your team's message.
 - Use team members' diverse knowledge to reach a variety of audiences.
-

Preparation

In Advance

- Make copies of handout and prepare transparencies for this activity.
- Invite the school district’s community/media liaison to this meeting to provide input on communications strategies.

Equipment and Materials

- Action Worksheets from the Action Planning Packet in the Toolkit Masters
- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipcharts, markers and masking tape for each group.
- Post your team vision, mission and goals or have copies available for each group.

Note to facilitator: For this activity, seat team members according to their representative group (all students at one table, etc). If the school district’s community/media liaison attends, introduce him or her to your team and encourage the liaison to circulate among the groups.

T3-17

Toolkit Masters
T3-17

Stage 3 • Setting Direction
Activity: Create a Communications Plan

Create a Communications Plan

Goals

- Create a plan for communicating your team’s message.
- Use team members’ diverse knowledge to reach a variety of audiences.

INTRODUCTION *(less than 5 minutes)*

Goals

- Share the goal of this activity by displaying [Transparency #T3-17](#).

Key Points

- Tell team members this activity will help them develop a plan to inform diverse audiences about the team.
- It also provides an opportunity for team members to take on new roles and share responsibility.

INSTRUCTIONS

Step 1 (5 minutes)

If team members are not yet in small groups, divide them into groups of 5–7 members. Remind them why it’s important to inform others about the team’s efforts. Such communications will help you reach your team’s goals. Communications can help your team with the following:

- Establish team identity through slogans and visual images.
- Gain credibility and demonstrate that you are a legitimate group doing positive work.
- Build positive impressions about the overall school community.
- Invite others to support your efforts and share in the team’s success.

T3-18

Toolkit Masters
T3-18

Step 3
Activity: Create a Communications Plan

Communicating Your Message to the Public

- Press releases
- Brochures
- Video
- Website
- Articles or letters to the newspaper
- Announcements in church bulletins
- Restaurant placemats
- School marquee sign
- Banners and signs
- T-shirts and bumper stickers
- School newspaper
- Radio and TV public service ads

Step 2 (5 minutes)

Review the audiences your team identified in *Toolkit Activity: Define the Audience and the Message, p. 3-25*. Remind team members that they can reach these audiences in different ways. Again, it’s important to develop your strategy based on **who** you want to reach, **why** you want to reach them and **what** you want to tell them. Provide examples of some strategies for reaching audiences in the school community by displaying [Transparency #T3-18](#).

Step 3 (5 minutes)

Remind team members that the Collaborative Action Team process emphasizes representative membership and shared leadership to ensure that your team represents the entire school community’s views. Developing communications strategies is one key area where your team needs **all** members’ expertise and knowledge to help reach all of the team’s audiences.

H-5

Action Planning
H-5

Action Planning Packet

Collaborative Action Team Action Worksheet

Directions: Develop a worksheet for each strategy. Enter a number for the goal. Write the number and description of the strategy on the blank lines. List the tasks necessary to implement the strategy in the order in which they will be performed. Indicate who is responsible for completing each task and the date it is to be completed. Use the last column to note the date on which the task is actually completed.

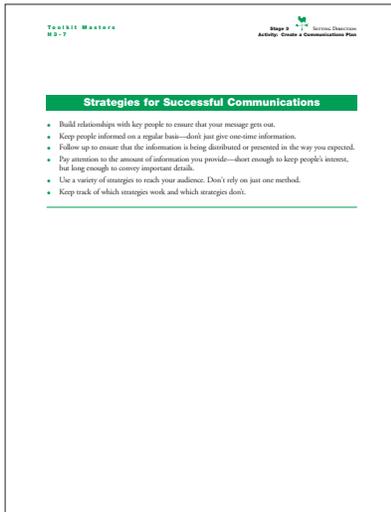
Goal # _____ Strategy # _____

| Task | Person(s) Responsible | Due Date | Done Date |
|------|-----------------------|----------|-----------|
| | | | |

Step 4 (25 minutes)

Distribute several copies of the Action Worksheet ([Handout #H-5](#) from the Action Planning Packet in the Toolkit Masters) to each of the small groups. Ask each representative group (school, home, community, students) to develop some action steps for reaching their group with the team’s message. Remind team members about the materials they developed during the last activity to help them

H3-7



reach these audiences. Give each group examples of good communications strategies by distributing [Handout #H3-7](#). Encourage them to keep these examples in mind while they work.

Step 5 (10 minutes)

Ask each group to present their communications plan to the whole team. After all groups have presented, ask the team to identify similarities and differences among these strategies. Identify any areas that overlap and places where you could use the same strategy with more than one group. Through consensus, adjust the plans to eliminate overlap.

Step 6 (5 minutes)

Explain that the team has developed strategies for sending the team's message directly to different audiences. For you to continue building momentum, the team must also communicate with media sources that reach these audiences. Ask for at least one volunteer from each representative group to serve on an ongoing media relations committee. Refer the group to [Guide Appendix C: Working with the Media](#) for more information on this topic.

WRAP-UP (less than 5 minutes)

Key Points

- Good communications help you reach your team's goals and ensure long-term success.
- It's important for your whole Collaborative Action Team to inform others about the team, since each team member is uniquely qualified to reach a different audience.

FOLLOW-UP

- Gather all group communication plans and attach them to your team's action plan.
- Meet with the media relations committee to start planning strategies for working with the media.

Stage 4: TAKING ACTION



Step: Develop Strategies

Activity Develop Strategies

(80 minutes)

Goal

- Develop strategies for achieving team goals.
-

Preparation

In Advance

- Make copies of the handout and prepare transparencies for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Overhead projector and screen
- Markers, flipchart pad and easel
- List of goals developed by team
- Blank pieces of paper for all team members

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Post your team’s vision, mission, goals and communication ground rules for all to see.

T4-1

Toolkit Masters T4-1

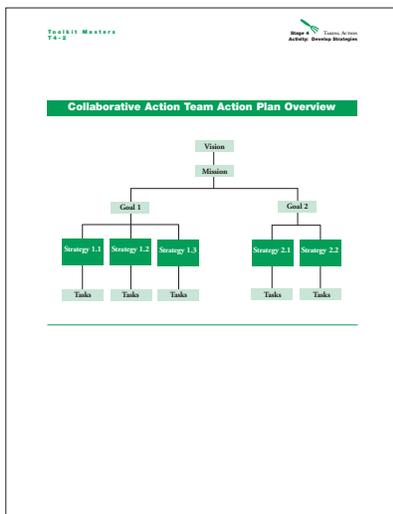
Stage 4 Taking Action
Activity: Develop Strategies

Develop Strategies

Goal

- Develop strategies for achieving team goals.

T4-2



INTRODUCTION *(less than 5 minutes)*

Goal

- Share the goal of this activity by displaying [Transparency #T4-1](#).

Key Points

- Clearly defined, measurable strategies are the key to implementing an effective action plan.
- Strategies describe the methods your team will use to achieve team goals. Developing strategies is the next step in the action planning process. (Display [Transparency #T4-2](#).)
- Strategies should be clear, realistic and measurable, and indicate a schedule for completion. An easy way to remember this is to write SMART strategies: *Simple, Measurable, Attainable, Realistic* and *Timely*.

INSTRUCTIONS

H4-1

Toolkit Masters
H4-1

Characteristics of a Good Strategy

1. Indicates who will do what and has an action verb (see below).
2. Specifies a target date by which you will complete the strategy.
3. Is observable and measurable—when you reach your target date, you can see whether or not you've achieved the results you wanted.
4. Is clear enough so that everyone on the team and in the community can understand it.
5. Is realistic—a good strategy works with the time and resources available and has a high probability for success.

Sample Structure for Strategies

(Who) will *(action verb)* a *(what)* *(for what purpose)*, by *(when)*.

Example: Our team will create a directory of after-school programs for teens in middle school to identify available services and gaps in services by July 1, 2001.

Sample Action Verbs to Use with Strategies

| | | | |
|------------|-----------|---------------|-----------|
| Access | Create | Increase | Obtain |
| Acquaint | Decrease | Individualize | Organize |
| Change | Develop | Inform | Plan |
| Complete | Devise | Initiate | Prepare |
| Compare | Establish | Interview | Present |
| Conduct | Identify | Investigate | Reduce |
| Consult | Improve | Involve | Refine |
| Coordinate | Implement | Locate | Stimulate |

Step 1 (10 minutes)

Have team members read [Handout #H4-1](#). Ask them to use this as a guide for writing clear strategies. Go over the characteristics and the sample structure for strategies by displaying [Transparency #T4-3](#) and [T4-4](#). Each goal may have one or more strategies. The strategies show specific plans for achieving a goal and identify ways to measure results. They also provide a deadline to achieve it. These are crucial steps for achieving results.

Step 2 (30 minutes)

The number of strategies required depends on the complexity of the goal. If team members are not yet in small groups, divide them into groups of 5–7 members. Have each small group decide what strategies need to be written for each goal. Point out that there are different ways to get results. The first task is to brainstorm all the ways the team could achieve a goal. Team members may want to list short-term and long-term approaches on blank sheets of flipchart paper.

T4-3

Toolkit Masters
T4-3

Sample Structure for Strategies

 (Who) will (action verb)
a (what)
 (for what purpose)
by (when) .

Step 3 (15 minutes)

After groups have brainstormed ways to achieve each goal, ask them to pick the top two or three approaches and write a statement that describes the strategy for each approach.

Step 4 (20 minutes)

Ask for a report from each small group. Record all suggestions on the board or a flipchart. With all team members, come to a consensus on the strategies that you want to implement for each goal. Remind them that the strategies should be attainable and realistic. Once you come to consensus, ask for a few volunteers to work on wording your strategy statements and add these statements to the action plan.

T4-4

Toolkit Masters
T4-4

Example Strategy Statement

Our Collaborative Action Team will create
 (Who) (action verb)
an after-school program at one elementary
 (what)
school that strengthens low-performing
 (for what purpose)
students' knowledge and skills in core
subject areas by February 1, 2001.
 (when)

WRAP-UP *(less than 5 minutes)*

Key Points

- Everyone on your Collaborative Action Team should be involved in planning strategies. People are more likely to support what they help create.
- Strategies are an important part of action planning. They provide the starting point for identifying specifically how you will achieve your goals. You'll use this information in the next steps of the Collaborative Action Team process—defining tasks and resources, and determining responsibilities and timelines for each strategy.

FOLLOW-UP

- Help the volunteers set a time to write the strategy statements. Ask them to report to the team at the next meeting. You can then reach consensus on the final wording at that meeting.
- Document your team's strategies on your action plan.

Stage 4: TAKING ACTION



Step: Determine Necessary Tasks

Activity Define Tasks and Resources

(65 minutes)

Goals

- Determine the tasks required to carry out your strategies and to meet your goals.
 - Identify the resources you need to implement your strategies.
-

Preparation

In Advance

- Make copies of handouts and prepare transparencies for this activity.
- Prepare multiple copies of flipchart sheets labeled with the first three columns (“Task,” “Person Responsible” and “Due Date”) from the “Collaborative Action Team Action Worksheet” (*Toolkit Masters: Action Planning Packet, Handout #H-5*). Post these sheets where everyone can see them.
- Gather the following equipment and materials.
- Make copies of the sample action plan from the *Toolkit Masters: Action Planning Packet, Handouts #H-6 – H-13*.

Equipment and Materials

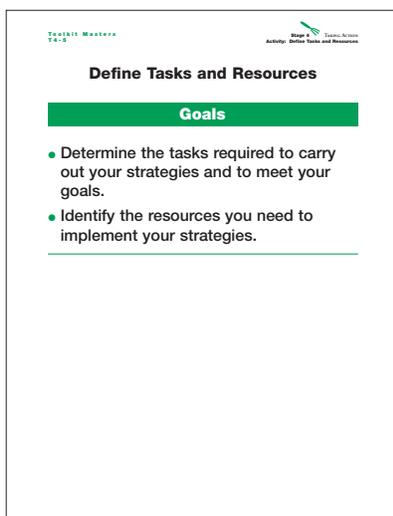
- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheets, markers and masking tape for each group.
- Post your vision, mission, goals and communication ground rules for all to see.

Note to facilitator: This activity and the next, *Determine Responsibilities and Timelines*, are related. You may want to combine both activities into one.

T4-5

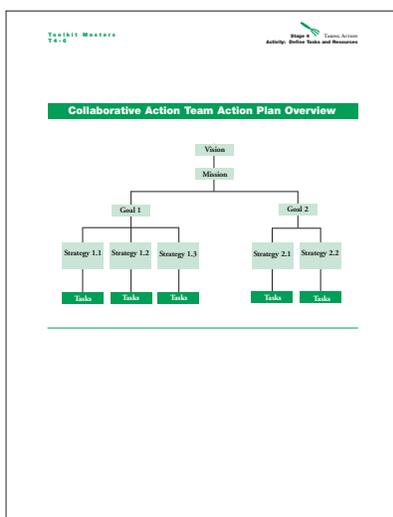


Define Tasks and Resources

Goals

- Determine the tasks required to carry out your strategies and to meet your goals.
- Identify the resources you need to implement your strategies.

T4-6



Collaborative Action Team Action Plan Overview

```

    graph TD
      Vision --> Mission
      Mission --> Goal1[Goal 1]
      Mission --> Goal2[Goal 2]
      Goal1 --> Strategy1.1[Strategy 1.1]
      Goal1 --> Strategy1.2[Strategy 1.2]
      Goal1 --> Strategy1.3[Strategy 1.3]
      Goal2 --> Strategy2.1[Strategy 2.1]
      Goal2 --> Strategy2.2[Strategy 2.2]
      Strategy1.1 --> Task1.1[Task]
      Strategy1.2 --> Task1.2[Task]
      Strategy1.3 --> Task1.3[Task]
      Strategy2.1 --> Task2.1[Task]
      Strategy2.2 --> Task2.2[Task]
  
```

INTRODUCTION *(less than 5 minutes)*

Goals

- Share the goals of this activity by displaying [Transparency #T4-5](#). Tell team members they’ll develop an action worksheet to define the tasks required for each strategy. Display [Transparency #T4-6](#) and explain that defining specific tasks (and assigning responsibility for those tasks) is the last step in the action planning process.

Key Points

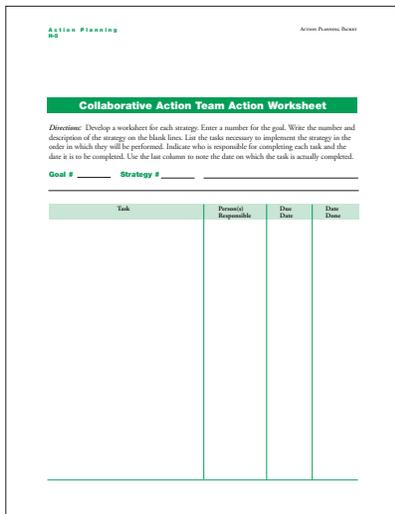
- Action planning is often time consuming. However, the more time your team spends now on planning how you'll carry out a strategy, the easier it will be to do so.
- The action worksheets ensure that all key aspects of implementing a strategy are carefully written out. They provide space for identifying tasks and timelines, listing necessary resources and assigning responsibilities. They also help you chart your progress toward reaching your goals.

INSTRUCTIONS

Step 1 (5 minutes)

If team members are not yet in small groups, divide them into 5–7 members. Post the list of strategies determined by the team for all to see. Assign a strategy to each small group to define the tasks and resources needed.

H-5



Collaborative Action Team Action Worksheet

Directions: Develop a worksheet for each strategy. Enter a number for the goal. Write the number and description of the strategy on the blank lines. List the tasks necessary to implement the strategy in the order in which they will be performed. Indicate who is responsible for completing each task and the date it is to be completed. Use the last column to note the date on which the task is actually completed.

Goal # _____ Strategy # _____

| Task | Person(s) Responsible | Due Date | Done Date |
|------|-----------------------|----------|-----------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Step 2 (20 minutes)

Distribute the sample action plan and ask team members to discuss ways they can accomplish their assigned strategy. Look at the sample action worksheets. Distribute Action Planning [Handout #H-5](#) and ask team members to list the tasks in the first column like the sample. Instruct members to include any resources that are needed, and how to obtain them, as part of the tasks. Ask each group to also write the tasks on the flipchart.

Step 3 (20 minutes)

Bring all the groups together to share their list of tasks. Reach consensus on the tasks required for each strategy. Discuss with the whole team any factors that either help or hinder the accomplishment of these tasks.

Step 4 (15 minutes)

Ask each small group to continue to work on the strategy assigned to them. Have them arrange the list of tasks in the order in which they need to be done. Tell the groups to list each task in the first column on the flipchart sheet previously prepared. Number each task in the order it is to be completed.

WRAP-UP *(less than 5 minutes)*

Key Points

- Action worksheets provide clear directions about who will do what, for what purpose and when. They also help you identify the resources necessary to complete each task.
- It normally requires more than one meeting to complete action worksheets. However, the time spent writing a clearly thought-out plan will save time later on. Action worksheets also help you better evaluate your team's progress toward meeting team goals.

FOLLOW-UP

- If not completed during this activity, ensure that all tasks are listed and numbered in order on a flipchart sheet labeled with the first three columns of the action worksheet. The team will use the completed flipchart sheets for the next action planning activity.
- Be sure to include a list of tasks developed for each strategy in the meeting minutes. This will keep members who may not have taken part in this activity informed of the progress the team has made.

Stage 4: TAKING ACTION



Step: Determine Necessary Tasks

Activity Determine Responsibilities and Timelines

(50 minutes)

Goals

- Develop timelines for each action worksheet task.
 - Decide who will be responsible for completing each task.
-

Preparation

In Advance

- Make copies of handouts and prepare the transparency for this activity.
- Make copies of the sample action plan from *Toolkit Masters: Action Planning Packet, Handouts #H-6 – H-13*.
- Gather the following equipment and materials.

Equipment and Materials

- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel
- Partially completed flipchart sheets from previous activity

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the flipchart.
- Post flipchart sheets from *Toolkit Activity: Define Tasks and Resources, p. 4-5*. These should have the first column of the action worksheet (Action Planning Handout #H-5) completed (“Task”).
- Provide flipchart sheets, markers and masking tape for each group.
- Post your team’s vision, mission, goals and communication ground rules for all to see.

T4-7

Toolkit Masters
T4-7

Stage 4 TAKING ACTION
Activity: Determine Responsibilities and Timelines

Determine Responsibilities and Timelines

Goals

- Develop timelines for each action worksheet task.
- Decide who will be responsible for completing each task.

INTRODUCTION *(less than 5 minutes)*

Goals

- Share the goals of this activity by displaying [Transparency #T4-7](#). Indicate that the team will complete the action worksheets begun in the previous activity. This will be accomplished through small group activities and team discussions.

Key Points

- It’s important to share the work of implementing the action plan. If a few people are asked to carry the bulk of the workload, they



can become overburdened and will most likely “burn out.” Emphasize the importance of everyone becoming involved and assigning responsibility to each and every team member. If you need to assign responsibility to team members not present during this session, contact them to obtain their agreement to work on these tasks.

- Action worksheets ensure that all key aspects of implementing a strategy are carefully written out. Tasks and timelines for each strategy must be identified, resources determined and responsibilities assigned. Action worksheets also help you chart the progress you’ve made toward a goal.

INSTRUCTIONS

Step 1 (15 minutes)

Post the flipchart sheets with the tasks outlined for each strategy. If team members are not yet in small groups, divide them into groups of 5–7 members. Assign a strategy to each small group and ask them to develop a timeline for completing each task. Distribute the sample action plans so that team members can see examples of how to do this. Remind the small groups that all tasks must be completed by the date listed in each strategy statement. Enter a date by which each task should be completed. Be realistic. Don’t try to do more than humanly possible with the resources available to you. Ask each group to write the number of each task and its due date on their flipchart for all to see.

Step 2 (10 minutes)

As a whole team, discuss the timelines each group has developed. Reach consensus on the due dates for each task.

Step 3 (20 minutes)

As a whole team, assign the most appropriate individual to be responsible for each task. If this person isn’t currently on the team, have someone ask him or her to become a member. Also, if a task is assigned to a team member who isn’t present during this session, have someone ask him or her to accept this responsibility. Ask for specific volunteers to make these contacts.

WRAP-UP *(less than 5 minutes)*

Key Points

- All aspects of the action worksheets must be clear to all team members. Plans must realistically assess the available resources. These might include team members' time, in-kind contributions from organizations (personnel time, building space, supplies, etc.) and financing materials you'll need. The action worksheets become the team's "road maps." They include the following:
 - Each task clearly stated, along with its deadline for completion
 - The person or persons responsible for completing the task
 - The resources required, along with methods for obtaining them
 - The sequence in which they will be done

FOLLOW-UP

- Ask members who have volunteered to contact individuals who were assigned tasks but weren't present at the meeting to contact them before the next meeting. Tell the volunteers to be prepared to make a report at that time.
- Ensure that all team members clearly understand their tasks and responsibilities.
- Record the tasks, timelines and responsibilities for each strategy on a separate action worksheet in your action plan. You now have a completed action plan for your team! Make sure every team member receives a copy.

Stage 4: TAKING ACTION



Step: Establish Evaluation Methods

Activity Establish Evaluation Methods

(80 minutes)

Goals

- Develop methods for evaluating team strategies.
 - Define performance standards for the team's strategies and goals.
-

Preparation

In Advance

- Make copies of handouts and prepare transparencies for this activity.
- Invite an evaluation expert from the school district, local college or non-profit organization to the meeting to give the team input on developing evaluation methods.
- Gather the following equipment and materials.
- Make copies of the team's action plan.

Equipment and Materials

- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheets, markers and masking tape for each group.
- Provide a copy of the action plan to each group.

INTRODUCTION *(less than 5 minutes)*

Goals

Tell team members this activity will help your team develop a plan for evaluating the strategies outlined in the team's action plan. (Display [Transparency #T4-8.](#))

T4-8

Toolkit Master
T4-8

Stage 4 TAKING ACTION
Activity: Establish Evaluation Methods

Establish Evaluation Methods

Goals

- Develop methods for evaluating team strategies.
- Define performance standards for the team's strategies and goals.

Key Points

Explain that this activity will help the team:

- Evaluate the impact of the team’s strategies on reaching team goals and
- Involve the whole team in evaluating the team’s work.

Explain that there are three types of evaluation:

- **Needs Evaluation**—Needs evaluations look at “what is” versus “what should be” in terms of actual versus needed services. They help justify the need to change existing programs or start new ones.
- **Process Evaluation**—Process evaluations ask, “Are we taking the steps we need to take to meet our goals?” and “Are we following our plan?” They help the team make adjustments and make changes to carry out projects more effectively.
- **Outcome Evaluation**—Outcome evaluations measure the impact or effect of a strategy, program or project. They can also show how costs compare with benefits.

Tell the team this activity focuses on outcome evaluation. Explain that needs evaluation and process evaluation are covered in other parts of the Collaborative Action Team process.

INSTRUCTIONS

T4-9

Toolkit Master
T4-9

Stage 4 Taking Action
Activity: Establish Evaluation Methods

Evaluation Steps

1. Develop evaluation questions.
2. Define performance standards.
3. Select measurements and methods.
4. Collect the information.
5. Analyze the data.
6. Report your findings.

Step 1 (5 minutes)

Briefly explain the steps involved in outcome evaluations by displaying Transparency #T4-9. You will use this process to plan and conduct your team’s evaluation.

H4-2

Develop Evaluation Questions

What important questions should we ask to find out if we're having an impact on our goals?

Examples

Goal: Support improvement in student achievement.
Strategy: Start an after-school program that targets middle and low-achieving students in core subject areas.
Question: What impact is the after-school program having on student test scores?

Goal: Enhance and increase parent and community engagement in schools.
Strategy: Host a forum where the superintendent informs parents about a standards-based curriculum to improve student achievement.
Question: What difference does it make if parents are informed about standards?

Goal: Support an increase in student achievement.
Strategy: Increase parent and community volunteerism in schools to provide subject-focused tutoring, mentoring and teaching assistance.
Question: How does increased and focused parent and community volunteerism affect students' reading, math and writing grades? How does it affect student behavior and discipline? How does it help the teachers improve their quality of teaching?

Step 2 (15 minutes)

Distribute the team's action plan. Ask the team to review the goals and strategies in the plan. Assign one strategy to each small group. Distribute **Handout #H4-2** and discuss the examples of evaluation questions. Explain that team members will now develop the questions they would like to answer when evaluating each strategy and goal.

After each small group has developed questions for their strategy, ask a spokesperson from each group to read the group's questions to the team. Explain that these questions will provide a basis for evaluation.

Step 3 (15 minutes)

To evaluate whether you have achieved your team's goals, you must define performance standards for each strategy. (Display **Transparency #T4-10.**) At a minimum, each strategy should have a performance standard that measures whether the strategy has been implemented and one that measures whether the strategy has helped achieve the goal. Distribute **Handouts #H4-3** and **H4-4** and display **Transparency #T4-11.**

T4-10

Performance Standards

- State the outcomes you can reasonably expect to achieve with your strategy.
- Answer the questions, *How much* will be done and *When*.

H4-3

Sample Evaluation Worksheet

Goal: The Collaborative Action Team will support an improvement in student achievement.

Strategy: The Collaborative Action Team will increase parent and community volunteerism at one school to provide subject-focused tutoring, mentoring and classroom teaching assistance.

Performance Standard 1: By the end of the school year, at least 90% of parents at each grade level will be volunteered at least 10 hours of effective tutoring, mentoring or teaching assistance in their child's classroom, and the number and hours of community volunteers at the school will have doubled.

| Information Needed | Measurement Tool Used | Who to Contact for Information | How to Collect Information | When to Collect Information |
|--|--------------------------------------|--------------------------------|---|--|
| Number of parents and community members volunteered | Form for tracking volunteer activity | Parent Liaison Teachers | Develop a form for tracking volunteer activity | Continuously Volunteers must fill out every time. |
| Number of hours volunteered | | | Include an on-screen form from an online tool. | |
| Services provided by parent and community members | | | | |
| Teacher satisfaction about effectiveness of volunteer tutoring, mentoring or teaching assistance. | Interviews | Teachers | Schedule interviews during "Dinner" teacher gathering time or planning periods. Have school Collaborative Action Team members conduct interviews. | Quarterly |
| Volunteer satisfaction about their effectiveness of their tutoring, mentoring or teaching assistance to the students and teachers. | Interviews | Volunteers | Have Parent Liaison schedule interviews with 10-15 randomly chosen volunteer parents. Have Collaborative Action Team members conduct interviews with randomly chosen community volunteers. | Quarterly |

H4-4

Sample Evaluation Worksheet

Goal: The Collaborative Action Team will support an increase in student achievement.

Strategy: The Collaborative Action Team will increase parent and community volunteerism at one school to provide subject-focused tutoring, mentoring and classroom teaching assistance.

Performance Standard 2: By the end of the school year, at least 50% of students in each classroom with over 150 parent and community volunteer hours will raise their reading, math and writing grades by one letter grade.

| Information Needed | Measurement Tool Used | Who to Contact for Information | How to Collect Information | When to Collect Information |
|--|--|--------------------------------|--|--|
| Classroom with over 150 parents and community volunteers | Form for tracking volunteer activity | Teachers Parent Liaison | Teachers Ensure that the form designed to track volunteer activity requests information about classes. | Continuously Volunteers must fill out every time. |
| First grading period reading, math and writing grades for every class | Reading, math and writing grades | Teachers | Ask principal for permission to review grade information. | First grading period |
| Last grading period reading, math and writing grades for those with over 150 volunteer hours | Table sheet with student identifiers by teacher, instead of name | Principal | Ask teachers to fill out table sheet, using student numbers to keep individual student names confidential. | Last grading period |

T4-11

Toolkit Masters
T4-11

Stage 4 Taking Action
Activity: Establish Evaluation Methods

Performance Standard Statement Examples

- Performance Standard 1:

By the end of the school year, at least 50% of parents at each grade level will have volunteered at least 10 hours of effective tutoring, mentoring or teaching assistance in their child's classroom, and the number and hours of community volunteers at the school will have doubled.

(when) (how much) (how much)
- Performance Standard 2:

By the end of the school year, at least 50% of students in each classroom with over 150 parent and community volunteer hours will raise their reading, math and writing grades by one letter grade.

(when) (how much) (how much)

Refer the team to the examples of performance standards in [Transparency #T4-11](#) and [Handouts #H4-3](#) and [H4-4](#).

Ask each small group to write at least two performance standards for the their assigned strategy on a flipchart. Use the evaluation questions as a starting point. Make sure each small group has at least one performance standard that measures whether the goal has been achieved.

Step 4 (10 minutes)

Ask each group to present their performance standards to the whole team. After all of the groups have presented, ask team members to evaluate whether they can reasonably expect to meet these performance standards in the timeframe allowed. Through consensus, make adjustments until all team members feel the standards are reasonable. Remind team members to be realistic about how quickly they can achieve these goals.

Step 5 (10 minutes)

Explain that the team must now decide how to gather information to learn whether or not these performance standards have been met. Discuss how to measure how close the team has come to meeting each performance standard. Also have the team decide how to gather that information. Ask team members to record their answers on their evaluation worksheets ([Handout #H4-5](#)). Tell them to refer to [Handouts #H4-3](#) and [H4-4](#) for examples.

H4-5

Toolkit Masters
H4-5

Stage 4 Taking Action
Activity: Establish Evaluation Methods

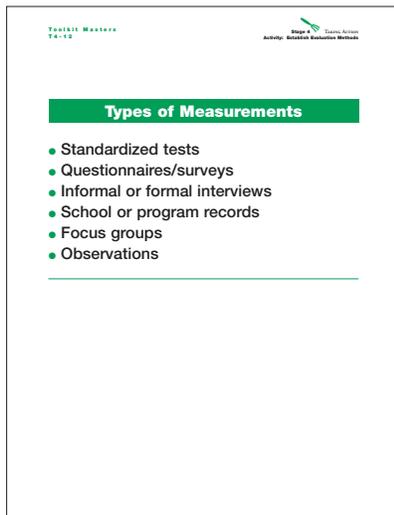
Evaluation Worksheet

Goal _____

Performance Standard _____

| Information Needed | Measurement Tool Used | Who to Contact for Information | How to Collect Information | When to Collect Information |
|--------------------|-----------------------|--------------------------------|----------------------------|-----------------------------|
| | | | | |
| | | | | |
| | | | | |

T4-12



The screenshot shows a slide titled "Types of Measurements" with a list of measurement types:

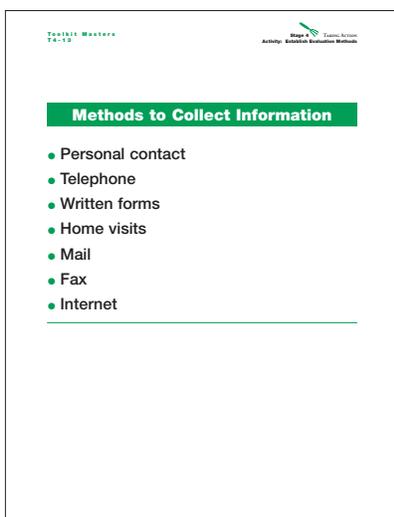
- Standardized tests
- Questionnaires/surveys
- Informal or formal interviews
- School or program records
- Focus groups
- Observations

Encourage each group to think about the kind of evaluation the team can reasonably hope to perform with the team's current people, money and time. Also encourage each small group to ensure that the whole team will be involved in the evaluation. Show examples of the types of measurements the team could use by displaying [Transparency #T4-12](#). Show potential methods for collecting information by displaying [Transparency #T4-13](#).

Step 6 (10 minutes)

Have each group share their evaluation plan. Ask for volunteers to collect and combine the plans into one plan to present to the team for approval. Ask for volunteers to serve on an ongoing evaluation committee to ensure that evaluations occur as planned.

T4-13



The screenshot shows a slide titled "Methods to Collect Information" with a list of collection methods:

- Personal contact
- Telephone
- Written forms
- Home visits
- Mail
- Fax
- Internet

WRAP-UP (less than 5 minutes)

Key Points

- Evaluation helps your team track its progress and measure the results of its work.
- Evaluation also helps you build support for the team's efforts from the school district and from funders.

FOLLOW-UP

- Meet with the volunteer committees to organize the evaluation plan.
- Monitor the implementation of the evaluation plan on an ongoing basis.
- Plan how to use evaluation results in other aspects of the team's work, such as the action plan, communications plan, etc. Think about how you can publicize your team's successes, based on the information you collect during your evaluation.

Stage 4: TAKING ACTION



Step: Monitor Progress

Activity **Report Progress and Review Responsibilities**

(35 minutes)

Goals

- Clarify team members' responsibilities for implementing the team's action plan.
 - Identify additional actions needed to implement the team's action plan.
-

Preparation

In Advance

- Make copies of the handout and prepare the transparency for this activity.
- Review “Brainstorming Guidelines,” [Handout # H2-7](#).
- Gather the following equipment and materials.

Equipment and Materials

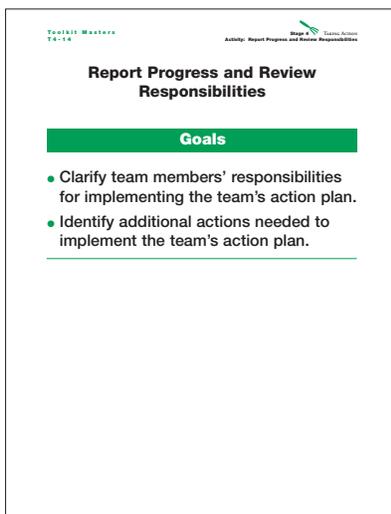
- Overhead projector and screen
- Markers, flipchart pad and easel
- Copies of completed action worksheets for each strategy

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.

Note to facilitator: All members who share responsibility for specific tasks on the action plan should be present during this activity.

T4-14



Toolkit *********
T4-14

Stage 4  TAKING ACTION
Activity: Report Progress and Review Responsibilities

Report Progress and Review Responsibilities

Goals

- Clarify team members' responsibilities for implementing the team's action plan.
- Identify additional actions needed to implement the team's action plan.

INTRODUCTION (*less than 5 minutes*)

Goals

- Share the goals of this activity by displaying [Transparency #T4-14](#). Tell team members to reflect on the progress being made on the team's action plan. Explain that the team may now need to make mid-course corrections.
- Tell team members they'll work as a whole team to monitor the progress on their action plan.

Key Point

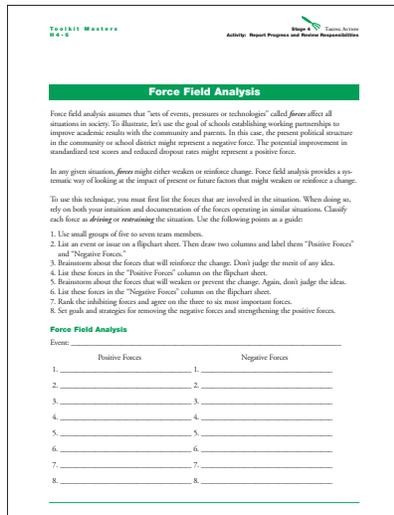
- The team will monitor the progress being made on team goals and strategies.

INSTRUCTIONS

Step 1 (20 minutes)

Select the specific goal and strategies the team is working on. Ask for a report from each person responsible for the ongoing tasks it identifies. Pay specific attention to issues requiring assistance.

H4-6



Force Field Analysis

Force field analysis assumes that "sets of events, pressures or technologies" called *forces* affect all situations in society. To illustrate, let's use the goal of schools: outdistating working partnerships to improve academic results with the community and parents. In this case, the present political structure in the community or school district might represent a negative force. The potential improvement in standardized test scores and reduced dropout rates might represent a positive force.

In any given situation, *forces* might either weaken or reinforce change. Force field analysis provides a systematic way of looking at the impact of present or future factors that might weaken or reinforce a change.

To use this technique, you must first list the forces that are involved in the situation. When doing so, rely on both your intuition and documentation of the forces operating in similar situations. Classify each force as *aiding or opposing* the situation. Use the following points as a guide:

1. Use small groups of five to seven team members.
2. List an event or issue on a flipchart sheet. Then draw two columns and label them "Positive Forces" and "Negative Forces."
3. Brainstorm about the forces that will reinforce the change. Don't judge the merit of any idea.
4. List these forces in the "Positive Forces" column on the flipchart sheet.
5. Brainstorm about the forces that will weaken or prevent the change. Again, don't judge the ideas.
6. List these forces in the "Negative Forces" column on the flipchart sheet.
7. Rank the inhibiting forces and agree on the three to six most important forces.
8. Set goals and strategies for removing the negative forces and strengthening the positive forces.

Force Field Analysis

Event: _____

| | Positive Forces | Negative Forces |
|----|-----------------|-----------------|
| 1. | _____ | _____ |
| 2. | _____ | _____ |
| 3. | _____ | _____ |
| 4. | _____ | _____ |
| 5. | _____ | _____ |
| 6. | _____ | _____ |
| 7. | _____ | _____ |
| 8. | _____ | _____ |

- If there are too few people to complete the tasks, ask for help from other team members.
- If roadblocks are identified, decide whether or not team members can eliminate them. If they can, ask them to do so.
- If team members can't eliminate roadblocks, use one or both of the following group process techniques to do so:

- Brainstorm ways to resolve all or part of the problem. Identify solutions and ask for volunteers to help resolve the problem.
- Have team members read [Handout #H4-6](#). Explain that it is sometimes helpful to analyze the factors or "forces" that impact the team's ability to accomplish their goals. A force field analysis helps you do that. Then conduct a force field analysis of an event or issue.
- Ask for volunteers to serve on a task force to develop a plan that addresses the inhibiting forces that surface during this analysis.

Step 2 (10 minutes)

Clarify with members the actions, roles and responsibilities that need to be taken to address the problem.

Review tasks that have been completed so far and congratulate the team on its accomplishments to date.

WRAP-UP *(less than 5 minutes)*

Key Points

- It's important to continually monitor the implementation of each goal and its strategies. Like road maps, these strategies create a path to a destination.
- As a result of this activity, it may be necessary to modify previously listed tasks.
- You can use this activity any time a problem comes up that relates to implementing a goal or strategy.

FOLLOW-UP

- Make necessary changes to the action plan as a result of this activity. Document these changes and communicate them to all Collaborative Action Team members.
- Continue to monitor the implementation of your action plan to ensure that tasks are being completed on time.

Stage 4: TAKING ACTION



Step: Monitor Progress

Activity

Recognize Member Contributions

(45 minutes)

Goal

- Recognize and celebrate individual contributions and team achievements.
-

Preparation

In Advance

- Prepare transparencies for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel
- 8 x 11" sheets of card stock

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheet, markers, 5–7 card stock sheets and masking tape for each group.

INTRODUCTION *(less than 5 minutes)*

Goal

- Share the goal for this activity by displaying [Transparency #T4-15](#).

Key Points

- Team members representing school, home, community and student body have come together to work as a team for the benefit of students and their families.
- Team members have contributed time, talents, experience and knowledge to successfully carry out the strategies and tasks outlined in the team's action plan.
- It's important to recognize team members for their individual contributions. This helps motivate team members and lets the team know about individual efforts and accomplishments.

T4-15

Toolkit Masters
T4-15 Stage 4
Activity: Recognize Member Contributions

Recognize Member Contributions

Goal

- Recognize and celebrate individual contributions and team achievements.

INSTRUCTIONS

Step 1 (5 minutes)

Have each team member take a sheet of card stock, write their name at the top and tape it on their back. (The facilitator should also do this and join team members in this activity.)

Step 2 (5 minutes)

Ask team members to think of all the ways that people attending this meeting have contributed to the team’s efforts to improve the school community. Tell them this activity provides an enjoyable way to recognize all team members’ contributions. Stress the importance of being as clear and specific as possible in their written feedback. Emphasize that clear feedback lets people know exactly what you appreciate about their contributions. Share examples of feedback by displaying [Transparency #T4-16](#). Leave it up throughout Step 3.

Step 3 (10 minutes)

Instruct team members to recognize each other’s contributions by writing their feedback on the paper taped to each other’s backs. Give them 10 minutes to move around the room and complete this activity. Ensure that all team members have at least one recognition statement on their back. When the time expires, have team members return to their respective tables.

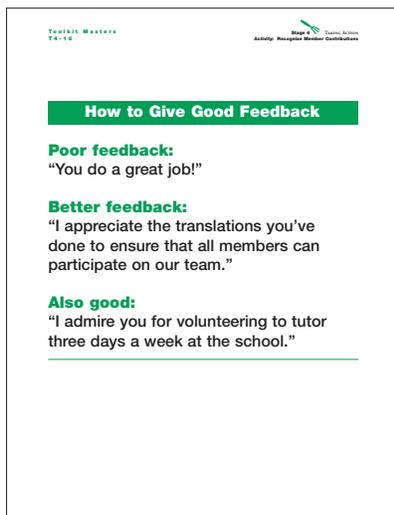
Step 4 (5 minutes)

Have team members remove the card stock sheets from their backs and silently read the recognition statements. At each table, ask members to talk about how it felt to be recognized. Have each group list the recognition statements and be ready to share them with the whole team.

Step 5 (10 minutes)

Have each small group share their lists. After all groups have reported, lead everyone in a round of applause to recognize these individual contributions.

T4-16



WRAP-UP *(less than 5 minutes)*

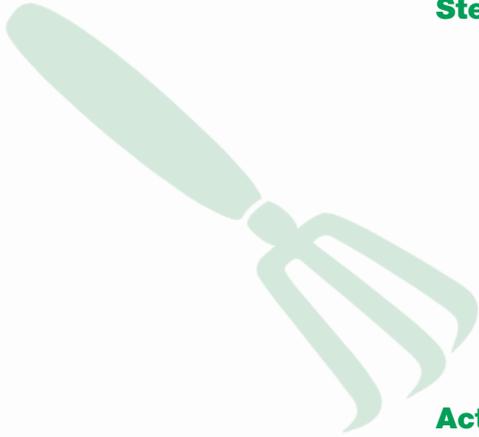
Key Points

- School, home, community and student representatives have shared leadership and responsibilities for developing your team. In doing so, individual contributions from each representative group helped the team collaborate successfully to benefit students and their families.
- Accepting and recognizing the talents, experiences and skills that members use to support the team's efforts helps create and maintain momentum.

FOLLOW-UP

- Ask a volunteer to develop the list of members' contributions into a press release. Have them send it to the local newspaper or to the school for publication in their school newsletter.

Stage 4: TAKING ACTION



Step: Expand Network Opportunities

Activity

Expand Network Opportunities

(70 minutes)

Goals

- Assess current contacts and connections.
 - Identify potential partners.
 - Develop strategies for approaching potential partners.
-

Preparation

In Advance

- Make copies of handouts and prepare transparencies for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Copies of the team mission statement and goals
- Overhead projector and screen
- Markers, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members.
- Provide flipchart pads, markers and masking tape for each group.

T4-17

Toolkit Masters
T4-17

Stage 4 TAKING ACTION
Activity: Expand Network Opportunities

Expand Network Opportunities

Goals

- Assess current contacts and connections.
- Identify potential partners.
- Develop strategies for approaching potential partners.

T4-18

Toolkit Masters
T4-18

Stage 4 TAKING ACTION
Activity: Expand Network Opportunities

Networking

What is it?
The process of developing relationships and contacts with key people and organizations.

Why is it important?
Networking helps the team:

- Recruit new team members
- Recruit short-term help for specific projects
- Avoid duplication of existing programs or projects
- Identify new opportunities and resources
- Learn from others' experiences

INTRODUCTION *(less than 5 minutes)*

Goals

Share the goals of this activity by displaying [Transparency #T4-17](#).

Key Points

- Define networking and explain why it's important by displaying [Transparency #T4-18](#).
- One networking goal is to increase Collaborative Action Team membership. However, it's also important to build connections with people who aren't team members but can support the team's work.
- Networking helps your Collaborative Action Team take on more challenging projects and survive changes in staffing, school leadership and funding.

H4-7

Toolkit Masters
H4-7

Stage 4  TAKING ACTION
Activity: Expand Network Opportunities

My Connections

Name: _____

We make contacts and connections with people every day and in many ways. Some of the ways we make contact follow:

- Business—customers, managers, store owners
- Churches—congregation members, religious leaders
- Membership organizations—block club, service group, society
- Neighborhood—neighbors, local institutions, such as library or museum
- Hobbies—sports teams, quilting guild
- Education—classmates, teachers
- Professional—consultants, representatives from other organizations
- Family—family friends, cousins, parents
- Politics—union officials, elected representatives, public servants

| ★/✓ | Name of Contact | Your Connection |
|-----|---------------------|---------------------|
| | Father Joe (sample) | Priest at my church |
| | Linda (sample) | Handicapper |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

INSTRUCTIONS

Step 1 (10 minutes)

Have team members read [Handout #H4-7](#). Tell them that the first step in building a network is to list the connections and contacts they already have in the school community and beyond. Ask team members to take a few minutes to individually list as many of their own contacts as they can. Review the examples on their handout.

Step 2 (10 minutes)

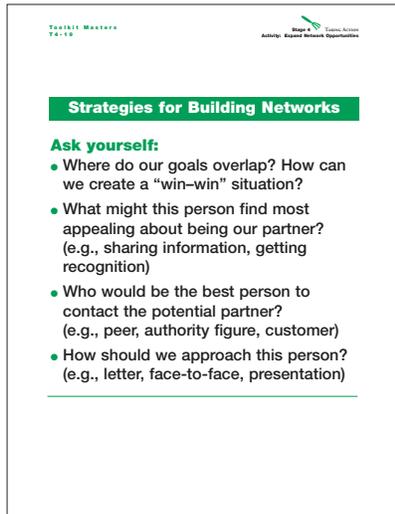
Remind team members of your team’s mission and goals. Ask team members to review their lists and place a star by the people whose support is *crucial* to the team’s short-term success. These are the people whose support the team *must* have to be successful. This will be a very short list. For some teams, it may include only the superintendent or school principal.

Divide the flipchart sheet into two columns, labeled “Current Partners” and “Potential Partners.” Ask the team for the names they have selected. With input from team member, write the names of persons actively involved with the team under the column marked “Current Partners.” List the other names under “Potential Partners” in a second column.

Step 3 (5 minutes)

Ask team members to look back over their lists. Have them put a checkmark next to those people who could *greatly* help accomplish your team’s mission and goals. These are people who have resources the team needs to fulfill its goals. Add these names to the flipchart, under the appropriate categories—“Current Partners” or “Potential Partners.”

T4-19



Strategies for Building Networks

Ask yourself:

- Where do our goals overlap? How can we create a “win-win” situation?
- What might this person find most appealing about being our partner? (e.g., sharing information, getting recognition)
- Who would be the best person to contact the potential partner? (e.g., peer, authority figure, customer)
- How should we approach this person? (e.g., letter, face-to-face, presentation)

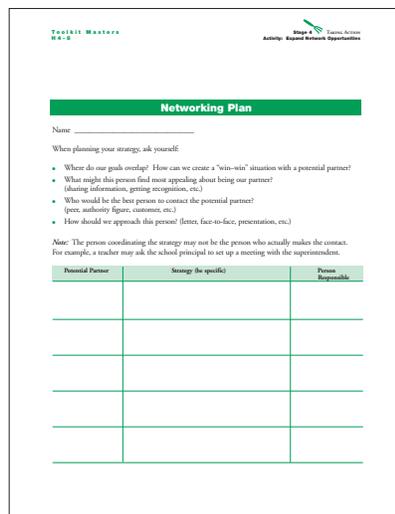
Step 4 (10 minutes)

Ask the team to review the list on the flipchart and to once more review the team mission and goals. What gaps do they notice? Are there key partners who have not yet been listed? Add these people or organizations to the flipchart sheet.

Step 5 (10 minutes)

Explain that the team will now think of ways to approach potential partners. Display [Transparency #T4-19](#) and discuss the questions team members should consider when developing strategies to expand their network. Remind team members that the successful strategy fits the person being recruited. Explain that some recruitment strategies can be implemented quickly, while others require planning and coordination.

H4-8



Networking Plan

Name _____

When planning your strategy, ask yourself:

- Where do our goals overlap? How can we create a “win-win” situation with a potential partner?
- What might this person find most appealing about being our partner? (sharing information, getting recognition, etc.)
- Who would be the best person to contact the potential partner? (peer, authority figure, customer, etc.)
- How should we approach this person? (letter, face-to-face, presentation, etc.)

Note: The person coordinating the strategy may not be the person who actually makes the contact. For example, a teacher may ask the school principal to set up a meeting with the superintendent.

| Potential Partner | Strategy (be specific) | Person Responsible |
|-------------------|------------------------|--------------------|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Step 6 (15 minutes)

Give all team members [Handout #H4-8](#) and ask them to pair up with another team member. Each pair will develop strategies to approach two to three potential partners on their own lists, or on the flipchart list. After 10 minutes, ask each pair to name one or two people they’ll approach in the next two weeks. List this information on the flipchart.

Step 7 (5 minutes)

Ask for a volunteer to collect team members’ contact information and compile all of the potential contacts. Encourage team members to talk to one another about scheduling visits to potential partners before they leave today’s meeting. Also have them inform team facilitators about any support or materials they need before leaving the meeting. Ask for two volunteers to call team members who agreed to approach potential partners to check on their progress in two weeks.

WRAP-UP *(less than 5 minutes)*

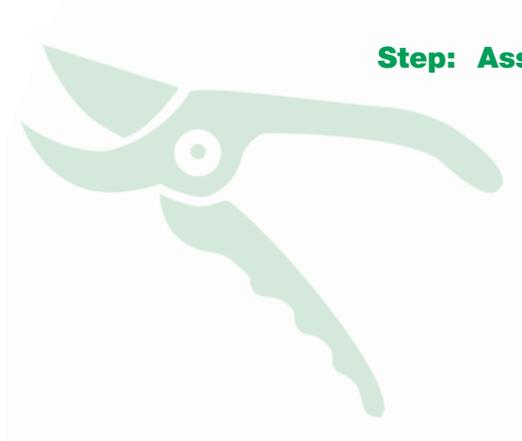
Key Points

- To maintain long-term success, your team must build connections with people and organizations.
- Ask team members to be prepared to report on their progress at the next meeting.

FOLLOW-UP

- Follow up with team members who have requested assistance for approaching potential partners. Provide the supplies and information they requested.
- Ensure that volunteers who are making follow-up calls to team members complete this task.

Stage 5: REVIEWING AND REFINING



Step: Assess Team Effectiveness

Activity **Assess Team Effectiveness**

(65 minutes)

Goals

- Assess the effectiveness of your Collaborative Action Team.
 - Use feedback to improve the way your team functions.
-

Preparation

In Advance

- Make copies of handouts and prepare the transparency for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheets, markers and masking tape for each group.
- Post communication ground rules for all to see.

INTRODUCTION *(less than 5 minutes)*

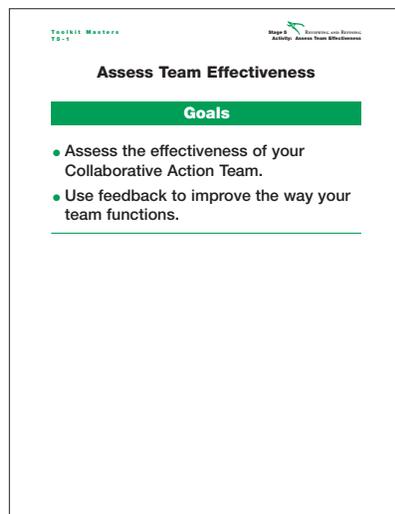
Goals

- Share the goals of this activity by displaying [Transparency #T5-1](#).

Key Points

- Process evaluation looks at *how* you have attempted to achieve team goals and how well the team works together.
- Process evaluation provides feedback you can use to refine or modify your team's process to make it more effective.
- Process evaluation also gives team members a voice in how you conduct team business—an important tool to support shared leadership.

T5-1



Toolbox Masters
T5-1

Stage 5
Activity: Assess Team Effectiveness

Assess Team Effectiveness

Goals

- Assess the effectiveness of your Collaborative Action Team.
- Use feedback to improve the way your team functions.

H5-1

Toolkit Masters
H5-1

Stage 5  **Reviewing and Refining**
Activity: Assess Team Effectiveness

Analyzing Team Effectiveness Questionnaire

Read both of the statements in each box. Circle a number ranging from 1 to 7 that most strongly describes how your team functions.

| Goals | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|--|---|---|---|---|---|---|---|
| Team goals are confusing or conflicting. | | | | | | | |
| Team goals are clear and shared by all team members. | | | | | | | |
| Team members show little interest in achieving goals. | | | | | | | |
| All members care about team goals and feel involved in achieving them. | | | | | | | |

Toolkit Masters
H5-1

Stage 5  **Reviewing and Refining**
Activity: Assess Team Effectiveness

Handling Conflicts

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Tensions and differences are avoided or denied. | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| The team addresses and works through conflicts. | | | | | | | |

Shared Responsibility

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Team members' knowledge, experience, talents and skills aren't used or appreciated. | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| Team members' knowledge, experience, talents and skills are used to achieve team goals. | | | | | | | |

Toolkit Masters
H5-1

Stage 5  **Reviewing and Refining**
Activity: Assess Team Effectiveness

Trust and Support

| | | | | | | | |
|--|---|---|---|---|---|---|---|
| Team members are distrustful. The atmosphere is careful and superficial. | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| Team members feel comfortable revealing feelings and receiving supportive responses from others. | | | | | | | |
| Criticism is common. Team members are afraid to give and receive feedback. | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| Team members listen to and use feedback. Everyone seems comfortable expressing disagreement. | | | | | | | |
| It's everyone for themselves. Team members don't support each other. | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| Team members show genuine concern for each other. | | | | | | | |

Creativity and Growth

| | | | | | | | |
|--|---|---|---|---|---|---|---|
| The team is in a rut and doesn't show growth or progress. | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| The team is flexible and seeks new and better ways to do things. | | | | | | | |
| Team members are stuck in old ways and over. | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| Team members continually change and grow in the roles they play. | | | | | | | |

H5-2

Toolkit Masters
H5-2

Stage 5  **Reviewing and Refining**
Activity: Assess Team Effectiveness

Analyzing Team Effectiveness Questionnaire Scoring Sheet

Average Score

To calculate the average score for each item, add the scores and divide by the number of people who answered the question. For each category, add the average for each item and divide by the number of items.

Example: Three people filled out item #1. Their scores were 1, 5 and 6. These people filled out item #2. Their scores were 5, 7 and 3. There were two items in the category.

| ITEM #1 | ITEM #2 |
|-------------------|-------------------|
| 1 + 5 + 6 = 12 | 5 + 7 + 3 = 15 |
| 12 / 3 = 4 | 15 / 3 = 5 |
| Average score = 4 | Average score = 5 |

Range of Scores

The range of scores for a category tells you how much agreement people had about the item.

Example: If no one answered 1 or 2 in a category, then the range of scores for that item is 3-7.

Example: If one person answered 2 in a category and everyone else answered 6, then the range of scores for that item is 2-6.

| Category | Average Score | Range of Scores |
|-----------------------|---------------|-----------------|
| Goals | | |
| Leadership | | |
| Decision Making | | |
| Handling Conflicts | | |
| Shared Responsibility | | |
| Diagnosing Problems | | |
| Communicating | | |
| Trust and Support | | |
| Creativity and Growth | | |

INSTRUCTIONS

Step 1 (15 minutes)

Distribute copies of Handout #H5-1 to each member. This handout identifies nine areas important to building team effectiveness. Review the instructions with the team and ensure that everyone understands how to record their answers. Give team members 10 minutes to fill out the questionnaires individually.

Step 2 (5 minutes)

Collect the completed questionnaires. Have two volunteers use Handout #H5-2 to total the responses. Ask the volunteers to calculate the results for each item using the Handout #H5-2 scoring sheet. While they're doing this, discuss Handout #H5-3 with the remaining team members.

Step 3 (5 minutes)

Distribute Handout #H5-3. Ask for a volunteer to take notes so you can use the results of the discussion to make future decisions. Review communications ground rules with the team. Remind team members that the goal of this assessment is to gather everyone's viewpoint about how they have been working so far and what they can do to improve. Encourage team members to openly share their opinions and to stay focused on improvement.

H5-3

Toolkit Masters
H5-3

Stage 5  **Reviewing and Refining**
Activity: Assess Team Effectiveness

Keys to Successful Collaboration

The following items are some of the keys to successful collaboration. Most of them are based on team members' signs of commitment and positive attitudes toward team building and action planning. The more these are present in your team, the greater your chance for success. In what areas do you feel these key items are present in your team?

- Key decision makers participate in team activities and are supportive of the team. The presence of supportive administrators and superintendents provides psychological support for the team's work.
- Team members consistently participate in team activities and stay informed about the team. Constant representation is important for the health and vitality of your team.
- Team members participate actively in meetings—discussing issues, making decisions and planning actions. Everyone present needs to contribute to the discussion, and everyone questions and keeps involved.
- Team members complete assignments between meetings. Work assigned to team subunits is carried out on time.
- Everyone contributes to decisions and goal setting. Consensus is generally reached. Even though not everyone may agree with the goals and strategy, the team needs to reach consensus. Team members need to develop goals and strategies themselves, rather than relying on the facilitator.
- Multiple leaders have evolved within the team. Many team members take on new roles and responsibilities. Several people need to be willing to fulfill leadership roles for the team.
- The team is a high priority for team members and the school community. Members see their participation as an important activity and put in the time needed to do the team's work. People believe the team's work is important.
- Members talk positively about the team process with each other and with individuals in the school community. Members who offer positive feedback demonstrate a sense of pride and support for the team.

Step 4 (15 minutes)

Lead a discussion of each item on [Handout #H5-3](#) with team members. Solicit feedback on whether or not they feel these items exist within your team. If most of the items exist within the team, congratulate team members on achieving this level of collaboration. If items aren't present, discuss what, if anything, can be done differently to achieve them.

Step 5 (5 minutes)

Ask volunteers who tabulated results on [Handout #H5-2](#) for a report. Write the questionnaire results on a flipchart in this format:

| | Average Score | Range of Scores |
|---------------------------|---------------|-----------------|
| A. Goals | 6.5 | 3–7 |
| B. Leadership | 5.8 | 4–7 |
| C. Decision making | 5.3 | 1–7 |
| etc. | | |

Step 6 (15 minutes)

Lead a discussion on the results. Ask if the scores surprised anyone. For high-ranking items (scores of 5–7), congratulate the team for a job well done. Then ask how the team can continue to do well in these areas. For low-ranking items (scores of 1–3), discuss possible causes and solutions. Suggest that team members who don't feel comfortable discussing their comments in front of the team write them down and leave them on the table anonymously.

WRAP-UP (less than 5 minutes)

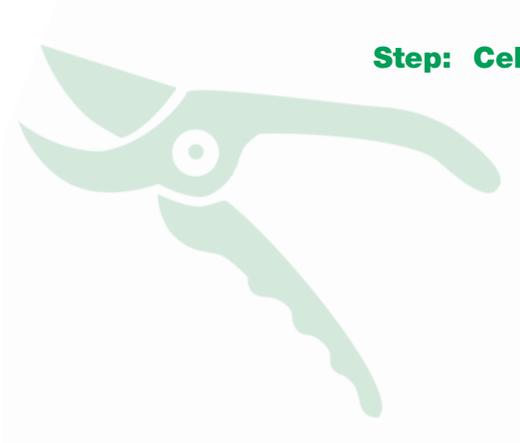
Key Points

- Regular evaluation of your team's efforts is important to shared leadership. It helps everyone on the team take ownership and responsibility for how the team functions.
- Re-emphasize the positive results of the evaluation and congratulate the team on the progress it's made in specific areas.

FOLLOW-UP

- Use the team's feedback to make recommendations for addressing problems that surfaced during the evaluation. Present the recommendations at the next meeting for team members' comments.

Stage 5: REVIEWING AND REFINING



Step: Celebrate Your Successes

Activity Celebrate Your Successes

(65 minutes)

Goal

- Identify ways to recognize and celebrate individual and team achievements.
-

Preparation

In Advance

- Prepare the transparency for this activity.
- Gather the following equipment and materials.

Equipment and Materials

- 8 x 11" sheets of card stock
- Printed list(s) of individual contributions recognized during *Toolkit Activity: Recognize Member Contributions, p. 4-23*. (Ignore this if your team has not done this activity.)
- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheet, markers, 5–7 card stock sheets and masking tape for each group.

INTRODUCTION *(less than 5 minutes)*

Goals

- Tell team members they'll use this activity to find ways to encourage, recognize and reward team members for the contributions they've made individually and as a team.
- Share the goal for this activity by displaying [Transparency #T5-2](#).

Key Points

- Team members representing school, home, community and student body have come together to work as a team to benefit students and their families.
- Team members have contributed time, talents, experience and knowledge to successfully implement the strategies and tasks that have moved your team closer to its goals.

T5-2

Toolkit Masters
T5-2

Stage 5
Activity: Celebrate Your Successes

Celebrate Your Successes

Goal

- Identify ways to recognize and celebrate individual and team achievements.

- Through the Collaborative Action Team process, your team has accomplished much more than individuals could accomplish alone. You have succeeded both in the quality of your collaborative teamwork and in the actions you've taken to improve results for students and their families.

INSTRUCTIONS

Step 1 *(10 minutes)*

Tell team members to use markers, pencils or crayons at their table to draw a picture that shows a contribution that they have personally made to the work of the team. Draw one picture for each contribution on a separate piece of paper. Remind them that even contributions that seem “small” are actually very important to the team's overall success.

Step 2 *(15 minutes)*

Ask team members to share their pictures with their small group. Ask each group to arrange all of the pictures into a story. It should show how all of the individual contributions helped accomplish the team's goals. Encourage members to be creative with their picture story. Ask them to tape the pictures onto a flipchart sheet to show the whole story.

Step 3 *(10 minutes)*

Have each small group share their picture story of how individual members contributed to team accomplishments. After all groups have presented, lead the team in a round of applause to congratulate everyone for all their hard work.

Step 4 *(10 minutes)*

Now ask the team to begin listing all of their accomplishments since team members began working together. Write these on a flipchart sheet as they are mentioned. Lead the team in a round of applause to celebrate these achievements.

Step 5 *(10 minutes)*

Have team members conduct a brainstorming exercise in their small groups to think of ways the team can publicly recognize

members' contributions and the team's successes. Tell each small group to pick their top two choices, using consensus decision making.

Step 6 (10 minutes)

Ask each small group to present their choices to the whole team as recommendations for recognizing contributions and celebrating success. Write all recommendations made by the small groups on a flipchart for all to see. After all groups have given their recommendations, have the whole team prioritize the list through consensus.

Have a group of volunteers form a task force to develop a plan for implementing these recommendations. Ask the task force to present their plan at the next meeting. Have another group collect all the written feedback and start a celebration scrapbook.

WRAP-UP (less than 5 minutes)

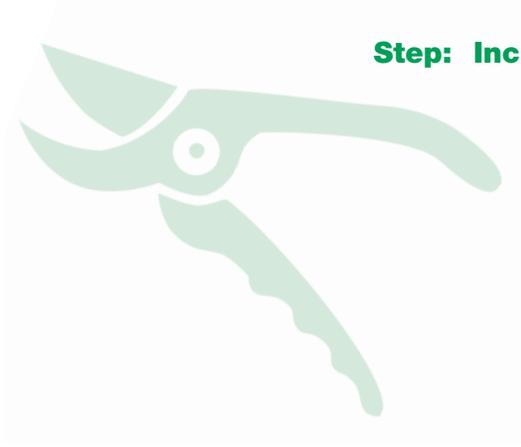
Key Point

- School, home, community and student representatives have shared leadership and responsibilities to develop this team. Individual contributions from each of these groups have helped your team collaborate successfully to benefit students and their families.

FOLLOW-UP

- Ensure that the task force developing the team's celebration understands what they need to do and has the resources they need to do it. Ask them to present their plan at the next meeting.
- Display the celebration scrapbook at special events. Encourage the team to add photos, newspaper clippings, flyers and other items whenever possible.

Stage 5: REVIEWING AND REFINING



Step: Increase Effectiveness and Impact

Activity

Increase Effectiveness and Impact

(110 minutes)

Goals

- Understand the major changes and issues your school community will face in the next five years.
 - Determine adjustments you will make to increase your team's effectiveness and impact.
-

Preparation

In Advance

- Make copies of handouts and prepare transparencies for this activity.
- Collect school community information as listed in the background information section of the Guide. Also refer to the *Toolkit Activity: Examine Your School Community, p. 1-13*.
- Ask a group of team members to prepare a 10-minute presentation summarizing the new school community data you have gathered. This presentation should focus on information that shows what changes are occurring in the school community. It should also address the main issues the school community will face in the next few years.
- Make copies of the most updated version of the following documents that your team has completed.
 1. “Factors That Impact Team Development” in *Toolkit Activity: Examine Your School Community, p. 1-13*
 2. “Organize Your Collaborative Action Team” in *Toolkit Activity: Plan the First Steps, p. 1-17*
 3. “Collaborative Action Team Shared Responsibilities” in *Toolkit Activity: Share Leadership Responsibilities, p. 2-29*
 4. Collaborative Action Team Action Plan (especially vision, mission, priority issues and goals)
 5. “Analyzing Team Effectiveness Questionnaire Scoring Sheet” in *Toolkit Activity: Assess Team Effectiveness, p. 5-1*
 6. Team membership list
- Gather the following equipment and materials.

Equipment and Materials

- Overhead projector and screen
- Markers, masking tape, flipchart pad and easel

Room Set-Up

- Prepare tables/chairs for groups of 5–7 team members. All members should be able to see each other, as well as the facilitator and the screen.
- Provide flipchart sheets, markers and masking tape for each group.
- Post your team’s mission, vision and goals.

Note to facilitator: Because of the length and intensity of this activity, it’s most effective as a special “recharge” retreat or working meeting. You can also divide the activity into two or three activities and conduct it over several meetings. The team may begin going through this activity while projects or programs are still being implemented.

INTRODUCTION *(less than 5 minutes)*

Goals

- Tell team members this activity will help them reassess the school community and decide what changes to make to help meet its changing needs. Share the goals of this activity by displaying [Transparency #T5-3](#).

Key Points

- Because the Collaborative Action Team process takes time, it’s natural for changes to occur both in the team and in the school community. The team must adapt and make adjustments to reflect the changing needs of the school community and team members.
- The new data that have been gathered and the results of team process and outcome evaluations will help you see what your team must do to have a greater impact.
- Through this activity, you will develop a blueprint for the adjustments your team will make in team membership, team organization, shared leadership and action plans to meet the needs of students and families.

T5-3

Toolkit Masters
T5-3
Stage 5 Reviewing and Refining
Activity: Increase Effectiveness and Impact

Increase Effectiveness and Impact

Goals

- Understand the major changes and issues your school community will face in the next five years.
- Determine adjustments you will make to increase your team’s effectiveness and impact.

T5-4

Toolkit Masters
T5-4

Stage 5
Activity: Increase Effectiveness and Impact

Reviewing Factors That Impact Team Development

Were you concerned about any factors that are no longer an issue?

Does any factor now hold promise for the team? Does any factor cause difficulty?

What do we need to do to reduce the negative impact these factors may have on our work? What do we need to do to increase their positive impact?

INSTRUCTIONS

Step 1 (15 minutes)

Ask for volunteers to present their 10-minute summary of the newly gathered school community data. Allow time for questions from team members.

Step 2 (10 minutes)

Ask the team to review the “Factors That Impact Team Development” chart from *Toolkit Activity: Examine Your School Community, p. 1-13*. Remind team members that they filled this out in Stage 1. Ask them to re-evaluate the chart based on the new information that has been shared. Display Transparency #T5-4 and use these questions for discussion.

T5-5

Toolkit Masters
T5-5

Stage 5
Activity: Increase Effectiveness and Impact

Reviewing Representative Membership

What members have we lost and need to replace to maintain representative membership?

Are there new membership groups or categories that aren't represented and need to be?

List each factor on the flipchart and record any suggestions for change. (See *Toolkit Activity: Examine Your School Community, p. 1-13* for a reminder on how to use this chart.)

Step 3 (10 minutes)

From steps #3–5 the team will work in small groups. If team members are not yet in small groups, divide them into 5–7 members.

Have the small groups discuss the implications of the new school community information on representative membership. Display Transparency #T5-5 and ask them to look at the team membership and discuss the questions.

Leave the transparency up while the team works on the questions. Ask team members to record suggestions on a flipchart sheet.

T5-6

Toolkit Masters
T5-6

Stage 5
Activity: Increase Effectiveness and Impact

Reviewing the Action Plan

Does our vision for the school community still reflect what we want to see happen?

Is our mission still the same?

Do our priority issues and goals still reflect the needs of the school community?

If not, what changes are needed to make our action plan relevant and accurate?

Step 4 (10 minutes)

Next, ask the small groups to discuss changes needed on the action plan. Refer them to their copies of the vision, mission, priority issues and goals. (Display Transparency #T5-6.)

Tell them to record suggestions on a flipchart sheet. Remind team members that the purpose here is not to get into the details of reformulating their vision, mission and goals statements. This will be done at a later time. Today, they will determine whether the action plan will need to be revised and how.

Step 5 (10 minutes)

Next, ask small groups to review the most current version of “Organize Your Collaborative Action Team” in *Toolkit Activity: Plan the First Steps*, p. 1-17. Tell them to identify any problems they see with the current organization of the team. Ask what they would recommend for a more effective team. Ask them to consider the following when thinking about this:

- Changes in the factors that impact team development
- Results of the “Team Effectiveness Assessment” (*Toolkit Activity: Assess Team Effectiveness*, p. 5-1)
- Needs of team members in their small group

Have them record suggestions on a flipchart sheet.

T5-7

Toolkit Masters
T5-7

Stage 5  Reviewing and Refining
Activity: Increase Effectiveness and Impact

Reviewing Shared Leadership

Does the shared leadership process we developed previously still work?

Are all members equally represented in leadership roles and responsibilities?

Are new members being given leadership opportunities?

Step 6 (10 minutes)

Finally, ask the small groups to look over the team’s “Shared Responsibilities” form from *Toolkit Activity: Share Leadership Responsibilities*, p. 2-29 and the process developed for sharing team leadership. Ask them whether or not revisions are needed. Display **Transparency #T5-7**. Have them record their suggestions on a flipchart sheet.

Step 7 (20 minutes)

Ask small groups to report on their suggestions for steps #3, 4, 5 and 6. Lead the team to consensus on what changes are needed in representative membership, team organization, shared leadership and action plans. Make sure the decisions are recorded.

H5-4

Toolkit Masters
H5-4

Stage 5  Reviewing and Refining
Activity: Increase Effectiveness and Impact

Collaborative Action Team Toolkit Activity Checklist

Check off each Toolkit Activity your team needs to review and/or repeat. Remember, some steps have more than one Toolkit Activity. You may use one this time that you didn't use before.

| | |
|---|--|
| <p>Stage 1: Getting Started</p> <ul style="list-style-type: none"> <input type="checkbox"/> Introduce the Process <input type="checkbox"/> Define Your School Community <input type="checkbox"/> Examine Your School Community <input type="checkbox"/> Plan the First Steps <p>Stage 2: Mobilizing the Team</p> <ul style="list-style-type: none"> <input type="checkbox"/> Define Your Representative Membership <input type="checkbox"/> Build Your Representative Membership <input type="checkbox"/> Determine Communication Ground Rules <input type="checkbox"/> Build Common Understanding <input type="checkbox"/> Examine Team Decisions <input type="checkbox"/> Use Consensus Decision Making <input type="checkbox"/> Share Leadership Responsibilities <input type="checkbox"/> Take on Leadership Roles <input type="checkbox"/> Develop Leadership through Mentoring <p>Stage 3: Setting Direction</p> <ul style="list-style-type: none"> <input type="checkbox"/> Agree on a Vision <input type="checkbox"/> Assess Your School Community <input type="checkbox"/> Identify School Community Issues <input type="checkbox"/> Develop a Mission Statement <input type="checkbox"/> Set Team Goals <input type="checkbox"/> Define the Audience and the Message <input type="checkbox"/> Create a Communications Plan | <p>Stage 4: Taking Action</p> <ul style="list-style-type: none"> <input type="checkbox"/> Develop Strategies <input type="checkbox"/> Define Tasks and Resources <input type="checkbox"/> Determine Responsibilities and Timelines <input type="checkbox"/> Establish Evaluation Methods <input type="checkbox"/> Report Progress and Review Responsibilities <input type="checkbox"/> Recognize Member Contributions <input type="checkbox"/> Expand Network Opportunities <p>Stage 5: Reviewing and Refining</p> <ul style="list-style-type: none"> <input type="checkbox"/> Assess Team Effectiveness <input type="checkbox"/> Celebrate Your Successes <input checked="" type="checkbox"/> Increase Effectiveness and Impact |
|---|--|

Step 8 (10 minutes)

Distribute **Handout #H5-4**. Based on what you’ve discussed today, help your team come to a consensus about which activities you need to do that you skipped before and which activities you need to review. This will help team members customize the process to meet the team’s ongoing needs and to become more effective. If you choose to repeat an activity, you don’t need to do every part of it in the same way as before. Do only those parts that you need to revisit or that you found most useful the first time around.

The checked Toolkit Activities represent a blueprint of a “customized” Collaborative Action Team process for your team to follow as you continue to work together.

Step 9 (5 minutes)

Based on the decisions made about transitions needed, discuss your goals for the next regular meeting.

WRAP-UP (less than 5 minutes)

Key Points

- This activity has helped your Collaborative Action Team identify important changes in the school community and determine what transitions the team must make to meet changing needs.
- Reviewing and adjusting your team’s representative membership, team organization, shared leadership and action plan prepares the team to continue collaborating to improve results for students and their families.

FOLLOW-UP

- ☐ Refer back to Toolkit Activities as needed. Use them to help your team work through the specific changes.
- ☐ Refer to [Handout #H5-5](#). Use this handout to lead the team in a discussion about long-term impact and sustainability after you’ve completed this activity.

H5-5

Toolkit Masters
H5-5

Stage 5  REVIEWING AND REFINING
Activity: Increase Effectiveness and Impact

Considerations About the Long-Term Impact and Sustainability of Your Collaborative Action Team

As you discuss the following issues, consider these questions:

- Are we ready to move to the next level in any of these important areas?
- Would it benefit the team to move forward in any of these areas?
- What internal and external changes, resources and efforts would this require?

1. **Scaling up.** You can “scale up” your Collaborative Action Team’s work and level of impact several ways:
 - Going to a deeper level by addressing underlying “causes” of problems.
 - Expanding into other schools in the same district, other school districts or other school communities.
 - Helping other schools form Collaborative Action Teams.
 - Affecting policy by introducing the collaborative process and its core concepts to policy and decision-making groups.
 - Including key leaders and policy makers as members of your team.
2. **Funding.** How your team supports itself financially will affect the team’s sustainability.
 - Obtaining grants and direct funding from corporations. Consider these carefully because they bring risks and limitations, as well as resources.
 - Soliciting in-kind contributions.
 - Bringing potential funders into the partnership.
3. **Institutional Structure.** Consider whether the team should become a permanent entity. There are several options:
 - Operating under the auspices of your school district or local governing bodies. This can bring credibility and authority to the team, but the politics of these governing bodies can divert your goals.
 - Establishing yourself as a nonprofit organization or a public-private intermediary.
4. **Networking.** Nurturing a network that allows your team to share experiences and to learn from other similar organizations will greatly increase the team’s sustainability and impact:
 - With other organizations in your school community.
 - With other collaborative organizations beyond your school community—by participating in local, regional or national networks and
 - With other entities interested in collaborating for school community improvement—presenting at the conferences of relevant associations.

Troubleshooting Guide

Table of Contents

- “Burn-Out” or Unrealistic Demands on Members** 6-3
- Divisiveness at Meetings** 6-4
- Engaging Students** 6-4
- History of Distrust Between School and Community** 6-5
- Identifying Issues and Deciding on Priorities** 6-5
- Leadership Struggles** 6-6
- Loss of Direction or Focus** 6-6
- Major Transitions in School Administration** 6-7
- Membership Not Representative** 6-8
- Need for a Public Information/Publicity Strategy** 6-8
- Need for Resource Development** 6-8
- Negative Publicity** 6-9
- Overall Disorganization** 6-9
- Poor Planning Efforts** 6-9
- Progress Isn’t Being Reported** 6-10
- Projects That Fall Short of Expectations** 6-10
- Roadblocks During Implementation of Your Action Plan** 6-11
- Strategies Aren’t Clear** 6-11
- Sustainability and Impact Issues** 6-12
- “Turf Battles” or Competition** 6-12
- Unequal Contribution and Involvement** 6-12
- Unproductive Meetings** 6-13

Troubleshooting Guide

This Troubleshooting Guide is designed to help you find activities and resources in the [Toolkit](#) when you need them most. You'll find it helpful when your team is facing difficulties and doesn't know how to proceed. The Troubleshooting Guide briefly describes common problems or challenges that Collaborative Action Teams sometimes face as they develop and work on their action plans. Bulleted lists suggest ways your team can address each problem. Most of the suggestions mention materials that will help you apply suggested solutions.

Many problems in this Troubleshooting Guide can occur at any point in the [Collaborative Action Team process](#). The Troubleshooting Guide identifies materials you may not be aware of if your team is early in the process. Some suggestions also refer you back to Toolkit materials you may have used in a previous stage. The problems addressed in some activities and resources may not surface until later on. Even if you're not sure your team has a problem, you may identify an underlying need by looking through this Troubleshooting Guide.

To determine how a Toolkit Activity can assist you, also refer to the related [Guide](#) information.

“Burn-Out” or Unrealistic Demands on Members

The team has been actively working together for a while. Team members feel they have too much work and can't do it all.

- Slow down the implementation of your action plan and review it. Even consider postponing things. Refer to *Toolkit Activity: Establish Evaluation Methods, p. 4-13* and *Toolkit Masters: Action Planning Packet*.
- Get feedback from members about the amount of work they can realistically take on in the near future. You can modify the meeting evaluation forms in *Toolkit Activity: Plan the First Steps, p. 1-17* to create a feedback form for this purpose.
- Evaluate your action plan [strategies](#) and determine if they're realistic. Refer to *Toolkit Activity: Develop Strategies, p. 4-1*.
- Sponsor member events that are just for fun.

Divisiveness at Meetings

Members from diverse backgrounds have different beliefs and don't know each other very well. They aren't getting along and aren't making decisions.

- Use *Toolkit Activity: Build Common Understanding, p. 2-15* and *Team Icebreakers and Energizers, p. 7-1* to help team members get to know and understand each other better.
- Review *Toolkit Activity: Determine Communication Ground Rules, p. 2-11* to ensure that members respect and listen to each other.
- Use *Toolkit Activity: Use Consensus Decision Making, p. 2-25* to brainstorm strategies to improve meetings.

Members are having difficulty reaching consensus. After decisions are made, some members often don't support them.

- Review the consensus decision-making concept and information in *Toolkit Activity: Examine Team Decisions, p. 2-21*.
- Conduct *Toolkit Activity: Use Consensus Decision Making, p. 2-25*. You may modify the activity to reflect a decision that's relevant or useful to your situation.

Engaging Students

Only a few students attend meetings, and those usually come only when their parents come to the meetings.

- Develop a targeted strategy to recruit other students by referring to *Toolkit Activity: Define Your Representative Membership, p. 2-1*.

The students who come to meetings tend not to participate in discussions or to volunteer to do work.

- Learn how to engage the students. Refer to *Guide Appendix A: Working in Youth–Adult Partnerships*.
- Use *Team Icebreakers and Energizers* and *Toolkit Activity: Take on Leadership Roles, p. 2-33* to increase students' active participation.

Students have participated actively before but seem less enthusiastic. They are dropping out of the team.

- Make sure you recognize students' contributions to the team's work. Refer to *Guide Appendix A: Working in Youth–Adult Partnerships* and *Toolkit Activity: Recognize Member Contributions*, p. 4-23.

Students volunteered for a particular task but failed to get it done. The students are discouraged, and other team members seem discouraged with the students.

- Find out what difficulties the students encountered. Decide how the team can better help them next time. Create an evaluation form to find out what problems they faced or discuss the problems in a meeting. Refer to *Guide Appendix A: Working in Youth–Adult Partnerships*. Refer to the “Force Field Analysis” in *Toolkit Activity: Report Progress and Review Responsibilities*, p. 4-19.

History of Distrust Between School and Community

There's always been a lack of communication and trust between the school system and others in the community. A lot of “finger pointing” about school district or community problems takes place during meetings.

- Use the Study Circles discussion model from *Toolkit Activity: Build Common Understanding*, p. 2-15. Include people from outside the team and discuss this history of distrust. This will help your team reach a better understanding of the problem and how it can be addressed, within and possibly outside of the team.
- Use school district data from *Toolkit Activity: Examine Your School Community*, p. 1-13. Focus members' attention on objective information and what to do about the problems indicated by the data, rather than on each other.
- Revise communication rules to prevent or curtail this behavior. Ensure that all are abiding by these rules. Refer to *Toolkit Activity: Determine Communication Ground Rules*, p. 2-11.

Identifying Issues and Deciding on Priorities

Your team wants to address the underlying issues causing problems in your school community. There are many suggestions as to what these might be, but the team is overwhelmed and unsure of which are most important.

- Gather school community data that might help the team decide which issues are most important. See *Toolkit Activity: Examine Your School Community, p. 1-13*.

People feel that the available data doesn't adequately reflect needs and issues that concern most people in the school community, or needs and issues of all parts of it. Team members disagree about what issues are most important.

- Generate your own data to determine what's most important. Refer to *Toolkit Activity: Assess Your School Community, p. 3-5*.

Leadership Struggles

There are leadership struggles between the lead facilitator, coordinator and recorder, and/or between other people.

- Develop role descriptions for the lead facilitator, coordinator and recorder. Refer to *Toolkit Activity: Share Leadership Responsibilities, p. 2-29* and *Toolkit Activity: Plan the First Steps, p. 1-17*.
- Look for leaders who are neutral and competent, not identified with factions within the team.

Certain team members don't seem to recognize the strengths and abilities of "non-professional" team members, i.e., students and some parents. They don't value their opinions as much and don't trust them in leadership positions.

- Review core concept of shared leadership in *Toolkit Activity: Introduce the Process, p. 1-1*. Then conduct *Toolkit Activities: Take on Leadership Roles, p. 2-33* and *Develop Leadership through Mentoring, p. 2-39*.

One or a few people are dominating meetings and always wanting their opinions and ideas to win.

- Use *Toolkit Activity: Examine Team Decisions, p. 2-21* to help the team and the dominant individuals recognize the problem and make plans to change it.

Loss of Direction or Focus

The team has been working together for a while. Team members seem uncertain about what to work on next, either because they've achieved all their goals or because something is diverting their

attention from the team's mission or goals.

- Review the definition of school community to become more focused. Refer to *Toolkit Activity: Define Your School Community, p. 1-9*.
- Discuss the team's mission and ask for suggestions on how to get team members back on track. Refer to *Toolkit Activity: Develop a Mission Statement, p. 3-15*.
- Examine whether you have fulfilled your team's goals and mission and needs to disband or change focus. Refer to *Toolkit Activities: Increase Effectiveness and Impact, p. 5-9, Develop a Mission Statement, p. 3-15* and *Set Team Goals, p. 3-21*.
- If the team still has strategies to work on or goals to reach, focus on one at a time. This will bring the team's attention back to the process. Review *Toolkit Activities: Develop Strategies, p. 4-1* and *Set Team Goals, p. 3-21*.

Major Transitions in School Administration

Your school or school system is experiencing administrative transitions. These transitions directly affect your team membership. The team has lost people who were filling leadership roles and responsibilities.

- Recruit representatives from the new administration and/or other school representatives by meeting with them and explaining the purpose of your Collaborative Action Team. Refer to *Toolkit Activities: Define Your Representative Membership, p. 2-1, Share Leadership Responsibilities, p. 2-29* and *Increase Effectiveness and Impact, p. 5-9*.

You aren't sure whether the new administration knows who you are and whether it supports the team's efforts.

- Send them information and follow up with a presentation. Refer to *Toolkit Activity: Define the Audience and the Message, p. 3-25* and *Toolkit Activity: Create a Communications Plan, p. 3-31* to develop information about the team. Refer to *Toolkit Activity: Introduce the Process, p. 1-1* and the [Introduction](#) to the Guide for an overview of the Collaborative Action Team process. You can use the transparencies in the Toolkit or the presentation on the CD-ROM.

Membership Not Representative

You've made efforts to let the school community know about your team and when your team meetings are. However, your team doesn't consistently represent all membership categories or the school community's diversity.

- Develop a targeted approach to recruit those missing groups. Refer to *Toolkit Activities: Define Your Representative Membership, p. 2-1* and *Build Your Representative Membership, p. 2-7* and *Guide Appendix A: Working in Youth–Adult Partnerships* or *Guide Appendix B: Engaging Business in Collaboration* (if these are specific areas of need).
- Identify whether your strategies or goals are alienating any particular groups, i.e., social service organizations that now see you as a competitor. Refer to *Toolkit Activities: Develop Strategies, p. 4-1* and *Set Team Goals, p. 3-21*.

Need for a Public Information/Publicity Strategy

A number of people and/or organizations have been asking for information about your team and its work. It's now necessary to determine a team information/publicity strategy.

- For help doing this, refer to *Toolkit Activities: Define the Audience and Message, p. 3-25* and *Create a Communications Plan, p. 3-31*.

Need for Resource Development

Team members know what resources they need to pursue team goals, but don't know how to access those resources.

- Consider local organizations that might be able to help by reviewing *Toolkit Activities: Expand Network Opportunities, p. 4-27*, *Define Your Representative Membership, p. 2-1* and *Create a Communications Plan, p. 3-31* and *Guide Appendix B: Engaging Business in Collaboration*.
- Develop a fundraising strategy, i.e., grants, donations from members' organizations or local businesses. Refer to *Toolkit Activities: Define the Audience and the Message, p. 3-25* and *Create a Communications Plan, p. 3-31*.

Negative Publicity

Negative comments that somehow involve the Collaborative Action Team have circulated around the community. They've even made their way to the media.

- If criticism is inaccurate, mount a public relations campaign to correct inaccuracies. Refer to *Toolkit Activities: Define the Audience and the Message, p. 3-25* and *Create a Communications Plan, p. 3-31* and *Guide Appendix C: Working with the Media*.
- Rebuild credibility and respect by using information from *Toolkit Activity: Introduce the Process, p. 1-1* and from *Guide Appendix F: Issues in Collaborative Work: A Review of the Literature*.
- Immediately get accurate information to all team members and to any groups or organizations crucial to your work.
- Appoint one person to act as a spokesperson for the team.

Overall Disorganization

Team members aren't getting minutes and meeting notices. They're getting last-minute information about where and when meetings will be. You can't make team decisions because people who were supposed to be at meetings aren't there, etc.

- Review your team's organization and who is responsible for these logistical tasks. Refer to *Toolkit Activity: Plan the First Steps, p. 1-17* and *Toolkit Activity: Share Leadership Responsibilities, p. 2-29*.

Poor Planning Efforts

Although the team makes decisions, it often doesn't seem to get anything done because of poor planning. Events are often being postponed.

- Start small and develop a workable planning process for an upcoming event. Use worksheets from the *Toolkit Masters: Action Planning Packet* and *Toolkit Activities: Define Tasks and Resources, p. 4-5* and *Determine Responsibilities and Timelines, p. 4-9*.

Progress Isn't Being Reported

After meeting for a while, team members are being asked to report on the team's progress to their supervisors, i.e., superintendent, school board, managers at member organizations, etc., but have not done so. The team needs to document its work.

- Refer to evaluation methods chosen during *Toolkit Activity: Establish Evaluation Methods, p. 4-13* and review progress on your action plan. Refer to *Toolkit Activity: Report Progress and Review Responsibilities, p. 4-19*.
- Use meeting minutes and agendas to write a report on what has been done. Refer to *Guide Appendix D: Conducting Effective Meetings*.
- Use the “Collaborative Action Team Development Checklist” in *Toolkit Activity: Introduce the Process, p. 1-1* to see where you are in the process.

The team has decided it would be good to make a presentation to the school board, city council and/or other organizations in the community to gain their support. However, the team hasn't done so.

- Refer to the evaluation methods chosen during *Toolkit Activity: Establish Evaluation Methods, p. 4-13* and review progress on your action plan. Refer to *Toolkit Activity: Report Progress and Review Responsibilities, p. 4-19*.
- Assess how team members feel about the team's progress so far using *Toolkit Activity: Assess Team Effectiveness, p. 5-1* and the “Collaborative Action Team Development Checklist” in *Toolkit Activity: Introduce the Process, p. 1-1*.
- Use *Toolkit Activity: Introduce the Process, p. 1-1* for information about the Collaborative Action Team process. You can use the [transparencies](#) in the Toolkit or the presentation on the CD-ROM.

Projects That Fall Short of Expectations

The team has worked hard getting a project together. It was well planned and everybody contributed. Due to a variety of circumstances, however, outcomes weren't as good as expected. The team feels that the project was a failure.

- Hold a discussion with the members involved. Discuss the causes of the failure and apply what you learn to future projects. Use performance standards determined during *Toolkit Activity: Establish Evaluation Methods, p. 4-13*.

- Recognize the positive aspects of the project. Refer to *Toolkit Activities: Recognize Member Contributions*, p. 4-23 and *Celebrate Your Successes*, p. 5-5.
- Organize a small, simple project with a high probability of success to re-energize the team. Refer to *Toolkit Activity: Define Tasks and Resources*, p. 4-5 and *Toolkit Activity: Determine Responsibilities and Timelines*, p. 4-9.
- Get feedback from outside, objective sources.

Roadblocks During Implementation of Your Action Plan

You've started implementing your action plan, but several team members have encountered unexpected problems. Things aren't going according to plan.

- Make sure you understand the problems that team members are having. Refer to *Toolkit Activity: Report Progress and Review Responsibilities*, p. 4-19.
- Depending on the nature of the roadblocks refer to *Toolkit Activity: Expand Network Opportunities*, p. 4-27 or *Guide Appendix B: Engaging Business in Collaboration* for solutions.

Strategies Aren't Clear

Your team has determined what issues to address and has stated them as goals, but you're having difficulty identifying and agreeing on the strategies most likely to reach them. People don't seem to know how to address the goals. Many ideas being debated seem unrealistic.

- Review your school community information. See if other organizations and institutions in the community have projects that support your goals. You shouldn't reinvent the wheel or get into more than what your team can handle. If your team can support such projects, that's a good strategy for working toward your goal. Refer to *Toolkit Activity: Examine Your School Community*, p. 1-13.
- Explore some of the ideas suggested by networking with organizations and people that might be able to help you determine which ideas are feasible. Refer to *Toolkit Activity: Expand Network Opportunities*, p. 4-27.

Sustainability and Impact Issues

Your programs/projects have been successful and people are worrying about how these will continue long term. These programs/projects fulfill an important need in your school community, but they're a lot of work. It might be better to have a staff member.

- Consider sustainability issues in *Toolkit Activity: Increase Effectiveness and Impact, p. 5-9*.

The team isn't happy with the impact it's having. Team members feel their impact could improve by changing the team's level of operation. They might want to narrow or broaden the team's definition of school community or reorganize themselves.

- Review focus and organization in *Toolkit Activities: Define Your School Community, p. 1-9, Increase Effectiveness and Impact, p. 5-9* and *Plan the First Steps, p. 1-17*.

“Turf Battles” or Competition

There's a sense of competition among certain team members, particularly those who represent divergent interests.

- Arrange opportunities for the organizations or people involved to talk about their differences. Help them focus on the team's goals. Use the discussion model from *Toolkit Activity: Build Common Understanding, p. 2-15*.
- Help those involved to focus on the team's vision. Secure their support for the vision statement. Refer to *Toolkit Activity: Agree on a Vision, p. 3-1*.
- Recruit other member organizations or people to help diffuse the competition. Refer to *Toolkit Activity: Define Your Representative Membership, p. 2-1* to determine who to recruit to make the team more representative and neutral.

Unequal Contribution and Involvement

The same people volunteer or are called upon to do almost all of the work.

- Use the list of member responsibilities in *Toolkit Activity: Share Leadership Responsibilities, p. 2-29* to emphasize the importance of members volunteering to take on responsibilities and contributing to discussions.

Members volunteer to take on responsibilities and tasks but do not follow through. The same few people end up doing all the work.

- Use *Toolkit Activity: Share Leadership Responsibilities, p. 2-29* as an accountability device. Write down names of those responsible and send reminders to everyone so that there's more accountability.
- Put people on the agenda for the next meeting to report on their progress. Refer to *Guide Appendix D: Conducting Effective Meetings*.
- Make sure the names of team members who agree to do tasks are on paper and that all members get a copy. Use *Toolkit Masters: Action Planning Packet*.
- Spend time discussing the problems members encountered that prevented them from following through. This should reduce the likelihood of the same excuses being used next time. Refer to *Toolkit Activity: Report Progress and Review Responsibilities, p. 4-19*.
- Recognize people's contributions, no matter how small. Refer to *Toolkit Activity: Recognize Member Contributions, p. 4-23*.

Although membership is representative and certain people attend consistently, they tend to observe instead of participate.

- Find out why. Develop a feedback form to get this information. See *Toolkit Activity: Plan the First Steps, p. 1-17* for examples.
- If they feel uncomfortable participating, have a social activity where team members can get to know each other. Also use *Toolkit Activities: Take on Leadership Roles, p. 2-33* and *Develop Leadership through Mentoring, p. 2-39* and *Team Icebreakers and Energizers*.
- If they don't see their participation as important or they don't want to do the work, emphasize that the team can't function well without everybody's input and help. Refer to *Toolkit Activities: Share Leadership Responsibilities, p. 2-29*, *Take on Leadership Roles, p. 2-33* and *Use Consensus Decision Making, p. 2-25*.

Unproductive Meetings

Everyone participates, but discussions frequently go off track, the agenda is rarely followed and things get pretty heated.

- Review *Guide Appendix D: Conducting Effective Meetings* and *Toolkit Activity: Determine Communication Ground Rules, p. 2-11*.

The team discusses issues at length but never reaches a firm decision. People leave without assigned responsibilities, and the same people end up making decisions and doing or delegating all the work.

- Review how to make effective decisions in *Toolkit Activity: Examine Team Decisions, p. 2-21*.
- Take measures that help you stick to the agenda, such as assigning a timekeeper at meetings. Refer to *Guide Appendix D: Conducting Effective Meetings*.
- Develop a form to pass around for members to sign up for rotating responsibilities, such as bringing refreshments. That way, you don't have to take time out from the agenda to do so.
- Use *Toolkit Activity: Use Consensus Decision Making, p. 2-25* to brainstorm strategies to improve meetings.

Team Icebreakers and Energizers

Icebreakers and energizers are excellent for helping Collaborative Action Team members relax and get to know and understand each other. These activities help team members disengage themselves from whatever they were doing before the meeting, and focus on the meeting goals. Icebreakers are designed to be used at the beginning of meetings but may be used at other times, depending on the topic being discussed. Each icebreaker and energizer in this [Toolkit](#) begins with a purpose, which is followed by instructions for using it. The time listed for each icebreaker is a general guide. It may take more or less time, depending on the size of the team and how well team members get into the exercise.

Aerobic Quiz¹

Explain to team members that you'll make statements that are either true or false. Ask team members to stand. If they believe the statement is true, they should sit down and stand back up. If the statement is false, they are to remain standing. Practice with questions such as "You are female. You are in (location of meeting)." Then make statements that review the content of the meeting for participants to respond true or false through movement.

Body Search² (15–20 minutes)

Break team members into small groups and place each group at a separate table. Have one team member of each group write all the letters of the alphabet down the left side of a piece of paper. For each letter of the alphabet, ask team members to name an item they brought into the room. It must be something they're willing to put on the table. Examples: B – bus schedule, W – wallet, etc. They can't use attitudes or behaviors, such as U for understanding. Award a small prize for the group that finishes first or has the most items at the end of 10 minutes. Ask them if they were amazed by the diversity of articles people carry. Also ask them to name the most unusual item. Tell them the talents and contributions each team

¹ Used by permission. ©1995 Resources for Organizations, Inc. All rights reserved, 800-383-9210.

² See note 1 above.

member can make to the team are much like the items on the table. Stress that the team needs every team members' contributions and resources. This exercise shows how each of us has different resources we can use to take on new roles and responsibilities.

Building Community (10–15 minutes)

Ask team members to individually complete the statements as you read them. Encourage them to use brief responses. Read the following statements:

- I enjoy meetings that...
- My favorite meal is...
- The word that best describes my community is...
- The children/youth of my community...
- I would like to teach children/youth...
- As a child, I thought school was...
- The biggest challenge facing families today is...

In small groups of 5–7, have team members read their responses to their group. As each person reads his or her completed statements, the others note responses similar to their own by placing a checkmark next to the statement on their own list. Encourage team members to discuss their individual reactions to the responses read out loud. During the last five minutes, lead a discussion with everyone. Focus on the following key points:

- Similarities and differences are the basis upon which a strong team develops.
- The variety and diversity of team members' backgrounds, experiences and knowledge add great value to the team.
- Team members share the common goal of improved results for students and their families.

Carpet Strips: The Stages of Concern³

Take four carpet strips (you can get them free from carpet stores) and mark the stages of grief (anger, denial, depression and acceptance) on them. Have team members stand on the strip that best rep-

³ See note 1 on p. 7-1.

resents their feelings about the changes happening in their school community as a result of the Collaborative Action Team. The team members then look at where they and others are standing on the continuum. Discuss team members' different viewpoints.

Change⁴

Pair off team members and have them take a good look at their partner. Then have them turn around and put their backs together. Ask each person to change five things about their appearance. Then have them turn around and guess what has changed. Most people will take something away, but some people will pick up a pencil or other items. The point is that change is usually thought of as giving something up, but change can also mean adding to what we already have. This exercise can be viewed as adding something to the skills and knowledge team members already have, rather than asking them to give something up. The changes being discussed as part of the Collaborative Action Team process are also designed to achieve the same end.

The Dollar/Idea Exchange⁵ (10 minutes)

Ask a team member to loan you a dollar. Display it prominently in one hand. Then ask another team member to loan you a second dollar. Carefully repay the first loaner with the second dollar and repay the second loaner with the first dollar. Then ask, "Are either of these persons now richer than they were before?" By contrast, if two ideas had been readily shared, not only the respective givers but all team members would be richer in experience than before.

Discussion questions:

- What factors prevent us from sharing useful ideas and insights with others?
- What forces encourage us to share ideas in a collaborative partnership, such as this Collaborative Action Team?

⁴ See note 1 on p. 7-1.

⁵ Newstrom, J. W., & Scannell, E. E. (1983) *More Games Trainers Play*. New York: McGraw-Hill. Reproduced with permission of The McGraw-Hill Companies.

Elevator Training⁶

Ask everyone to stand up and look up at the ceiling for several seconds. Then say, “You have all just participated in a training session. You are on your way to the top because you have participated in elevator training.”

Fortune Cookies⁷ (30–60 seconds per participant)

Give team members a fortune cookie as they arrive. At the beginning of the meeting, ask them to read their fortune and then explain to a partner or to small group team members how the fortune relates to the purpose of the Collaborative Action Team meeting or to their life.

Four Facts⁸ (10–15 minutes)

Ask team members to write four facts about themselves. One “fact” should be untrue. Have team members read these facts to the other members, or if you have a large team membership, to a small group by table. Instruct other team members to note the number of the fact they think is untrue. After all team members have shared their facts, have each team member reveal the untrue fact. Survey team members on how well they did at determining the truth from fiction.

Gestures⁹

To help team members remember a list of facts or steps, instruct them to come up with a body gesture (it has to be polite) that would help them remember each fact or step. Assign small groups one of the facts or steps to develop a gesture. Then go from group to group asking participants to share their gesture, repeating that of the group before. After all groups have shared, the total team membership will do all the gestures and the facts or steps that go with them.

⁶ See note 1 on p. 7-1.

⁷ See note 1 on p. 7-1.

⁸ See note 1 on p. 7-1.

⁹ See note 1 on p. 7-1.

The Human Spider Web¹⁰ (10 minutes)

Divide team members into groups of 5–7. Have each group move where they can stand in a small circle. Tell everyone to extend their left hand across the circle and grasp the left hand of the person opposite them. Then have them extend their right hand across the circle and grasp someone's right hand.

Tell them to unravel the spider web of interlocking arms without letting go of anyone's hand. You can time them or have them compete with other groups to see who finishes first. Discuss what lessons this exercise has for future team building in your Collaborative Action Team.

Koosh Ball Review¹¹

Use a Koosh ball to play Hot Potato. Say, “Hot potato, hot potato, hot potato” as the team members toss the ball around the room. When you say “stop,” the person with the ball must tell one thing he or she got out of today's meeting.

M&M's Bongo (5–10 minutes)

Place a cup of M&M's on each table. Ask team members to pass the cup and have each person take two M&M's. Eat one! Write the following on the flipchart or display it on an overhead. According to the remaining color, ask each team member to share with the whole group or in small groups (depending on the time available) the following:

- Red Tell about someone you love.
- Brown Share anything fun (hobby).
- Blue Share what or how you contribute to your Collaborative Action Team.
- Green Share something unique about yourself.
- Orange Share something you do well.
- Yellow Share what makes you happiest.

¹⁰ Scannell, E. E., & Newstrom, J. W. (1991) *Still More Games Trainers Play*. New York: McGraw-Hill. Reproduced with permission of The McGraw-Hill Companies.

¹¹ See note 1 on p. 7-1.

Middle Name Game¹² (15–30 seconds per participant)

Have each team member give his or her middle name and tell how or why the name was chosen. Begin the process yourself, and if appropriate, do so in a light, humorous way.

Most Commonly Asked Questions¹³

Write questions that you anticipate will or should come up in the discussion of a specific topic on note cards. Tape them under chairs before your team meeting begins. When the question-and-answer session takes place and no one is asking questions, instruct team members to look under their chairs and if they find a question to read it. You can then say, “Oh, I’m so glad you asked that question” and answer it. This breaks the ice for future questions.

Name Tents¹⁴ (5–10 minutes)

Before team members arrive, place five markers and several blank sheets of paper at each table. Instruct team members to take a sheet of paper and to fold it into threes, like a letter. On one side of the tent, have them write their name and decorate it any way they want. On the other side, have them draw a picture that shares anything they want to share about themselves—a hobby, etc. Draw a stick figure to show that team members don’t have to be artists. They just need to draw a picture that gets the idea across. Then instruct team members to meet as many people as possible in a given time by using the name tent to tell other team members something about themselves.

The National Collaboration Test¹⁵ (5 minutes)

In a light way, tell team members you’re going to administer the National Collaboration Test to see which team members are good at collaborating and establishing effective partnerships. Have each person place their right hand on a flat surface with fingers outstretched. Fold the middle finger under, making certain the knuckles on the middle finger stay tightly on the flat surface.

¹² See note 10 on p. 7-5

¹³ See note 1 on p. 7-1.

¹⁴ See note 1 on p. 7-1.

¹⁵ Newstrom, J. W., & Scannell, E. E. (1980) *Games Trainers Play*. New York: McGraw-Hill. Reproduced with permission of The McGraw-Hill Companies.

Advise team members that you're going to ask four simple questions. If the answer is yes, have them respond by raising the thumb or finger you indicate. Read the following statements aloud:

1. Start with your thumb. Are you involved in a Collaborative Action Team? If yes, raise the right thumb high.
2. OK, thumb down. Now for the pinkie. Do you enjoy food? If so, raise the smallest finger.
3. OK, now for the forefinger or index finger. Do you enjoy what you do? If so, raise the forefinger.
4. Thank you. Now with the thumb and fingers in their original position, here's the last question. Using the ring finger, and please be honest, are you really any good at collaboration? If so, raise your ring finger.

The quick laughter will show that if team members hold their knuckles and other fingers down, it's practically impossible to raise their ring finger.

The New Company¹⁶ (15 minutes)

Divide team members into small groups. Announce that each group has \$20 million to start a new company. Each group must come up with a company name and develop a product company to sell. If there's time, have each group also come up with a company sign and slogan.

Nothing's Impossible¹⁷ (15 minutes)

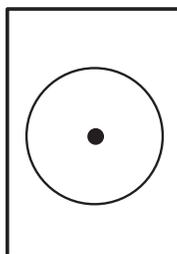
Before anyone arrives, draw a circle with a dot in the middle on one flipchart sheet (Example A). Be sure to use a marker that doesn't bleed through the paper.

Ask team members if they think they can reproduce the drawing on the flipchart on a blank sheet of paper without lifting their pen off the paper. Ask for suggestions on how this might be done. Then follow the directions below to reveal the solution and show that we can solve the seemingly impossible when we change our mindset. This activity is especially helpful when a team is facing a very difficult issue or problem.

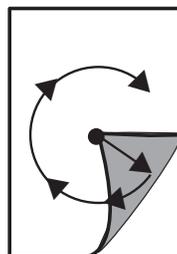
¹⁶ See note 1 on p. 7-1.

¹⁷ See note 5 on p. 7-3.

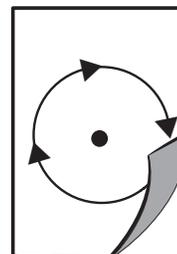
Example A



Example B-1



Example B-2



Solution: Draw a dot in the middle of a blank flipchart sheet. Then, without lifting your marker, fold the lower right-hand corner of the sheet over until its tip touches the dot you just drew. Draw a line across the folded portion from the dot to begin drawing a circle toward the left. (See Example B-1.) When you reach the edge of the folded portion, let it drop back into place. Continue drawing to complete the circle. (See Example B-2.)

Our Community Circle¹⁸ (10 minutes)

One team member begins by talking about him/herself (name, where from, and something personal or professional). As soon as another team member realizes they have something in common, that member gets up and stands next to the first. That second team member then begins talking about him/herself (name, where from, what they have in common, and something new). This process is repeated until all team members are standing in a big circle around the room. The last person, who completes the circle, must find something in common with the first team member as well.

Paper Body Stretch¹⁹

Hold up a piece of paper and explain that it corresponds to team members' bodies. The upper left corner represents the left arm. The upper right corner represents the right arm. The lower corners represent the legs, etc. Ask team members to stand and make the same movements you make with the paper. Fold one corner down, fold the top edge down, fold one corner up, crush the paper, etc. End

¹⁸ See note 1 on p. 7-1.

¹⁹ See note 1 on p. 7-1.

with the challenge that anyone who can do the next movement will win a major prize. Then fold both bottom corners up and grin from ear to ear.

Participant Introduction²⁰ (5–10 minutes)

Write the purpose of the meeting out in paragraph form. Then write the sentences individually on index cards and numbered 1, 2, 3. . . . Pass these cards out randomly to team members. When it's time to call the meeting to order, say, "Hello, my name is _____. Who has card number 1? Read it please." Repeat for card 2, 3, etc. This gets people involved from the very beginning of the meeting.

Playing Card Mixer²¹ (Done before meeting convenes)

As team members enter the meeting, give each one a single playing card drawn randomly from a deck of cards. If there are more than 30 team members, use two decks. Ask them to assemble three to four other people to combine their cards for the best poker hand. If appropriate, the winning team can be awarded a small prize.

Preferences (10 minutes)

Conduct this exercise in an area where no tables will block participants' movements from one side to another. Explain that we all have different preferences or different views on various issues. Say you'll be asking for two different points of view on some items or issues. Ask participants to choose which they prefer. Explain that one side of the room represents one viewpoint and the other side represents another. Then have them walk to the side that represents their choice. Select any number of items that fits the time available. Don't select sensitive topics or political issues that would embarrass team members. As you call out each item, raise your right hand when you mention the first point of view and ask those who agree to go to the right. Raise your left hand when you call out the other point of view and ask everyone else to go to the left. Repeat this process for each pair of items. After completing the exercise, ask people to return to their seats. Then lead a discussion of the preferences we have in our lives. Consider how they affect the way we act

²⁰ See note 1 on p. 7-1.

²¹ See note 5 on p. 7-3.

and behave. Ask if team members were comfortable making these choices and sharing them for all to see. Tell them we need to understand our preferences and learn to understand and appreciate them in each other. These differences form the basis for a strong Collaborative Action Team. Some example items follow:

| | | |
|----------------------|----|---------------------------|
| Soft-Serve Ice Cream | or | Hand-Dipped Ice Cream |
| Like to Study Alone | or | Like to Study With Others |
| Rock and Roll | or | Easy Listening Music |
| Morning Person | or | Night Person |
| Fiction Books | or | Nonfiction Books |
| Math | or | Reading |
| Coca-Cola | or | Pepsi |
| Study Hall | or | Recess |
| Outgoing | or | Reserved |
| Trains | or | Airplanes |

Self-Disclosure Introductions²² (5–10 minutes each)

Try one or more of the following methods to introduce team members to one another:

- Ask team members to take two items from their purse, wallet or pocket. When introducing themselves, they should use whatever they took out to describe themselves. Example: “I’m superstitious, so I carry a rabbit’s foot.”
- Ask team members to state their names and attach an adjective that describes a dominant characteristic and starts with the first letter of their name. Example: Cooperative Chris, Sharing Sam, Dancing Diane.
- Have team members introduce themselves by name but also provide a nickname that they now have, once had or would be willing to have if they could pick their own. Then, during any break or after the meeting, encourage team members to circulate and explore the reasons behind their announced nicknames.

²² See note 15 on p. 7-8

- Ask team members to introduce themselves as they think their best friend would—describing their likes and dislikes, recreational interests, personal aspirations, etc.

Siblings²³ (15 minutes)

Ask team members to divide themselves in the four corners of the room with these subsets:

1. If they were the oldest in the family
2. If they were the youngest in the family
3. If they were any place in the middle
4. If they were an only child

Ask them to take five minutes to recall what they liked or disliked about their respective places in their growing up days. In retrospect, would they have preferred a different place? After five minutes, ask a spokesperson from each group to summarize the group's answers.

Sit on It!²⁴ (2 minutes)

Here's something you can do if some team members seem preoccupied or negative or don't want to be at this meeting. Ask everyone to take a piece of paper and write down everything that's on their mind that they should be doing instead of being at this meeting. Then have them fold the paper up and sit on it for the rest of the meeting. There is nothing they can do about those things while they are in this meeting.

Stand Up²⁵

Ask team members to stand up when they have completed a group task. This lets you know they are finished and helps energize them.

A Standing Ovation²⁶

Have all team members stand up, put both arms out to their sides and then bring their hands together to clap. Then tell them to do

²³ See note 5 on p. 7-3.

²⁴ See note 1 on p. 7-1.

²⁵ See note 1 on p. 7-1.

²⁶ See note 1 on p. 7-1.

this faster, faster and faster until it sounds like applause. Then tell them to sit down and thank them for that standing ovation.

Stars and Globes (15 minutes)

Encourage participants to dream the dream and think outside of their usual boundaries.

1. Put a star or globe sticker on each nametag before the meeting. Ask each star to find a globe and work together in pairs.
2. Ask the stars to imagine they're outer space visitors to your school community five years from now. Ask the globes to imagine they're the guides for the celestial visitors.
3. Ask the stars to describe *what they hope to see for children* in your community five years from today. Then ask the globes to describe *what they hope the children are like* in your community five years from now.
4. Take about three minutes for each group to discuss its descriptions. Call on several pairs to share their visions with the whole group. Record these on a flipchart and post the results.

Symbols²⁷ (15 minutes)

On a flipchart, write 1=UL, 2=UM, 3=UR, 4=ML, 5=MM, 6=MR, 7=LL, 8=LM, 9=LR without displaying the following tic-tac-toe pattern.

| | | |
|---|---|---|
| 1 | 2 | 3 |
| 4 | 5 | 6 |
| 7 | 8 | 9 |

Ask team members to estimate how long it would take them to learn this code. Then ask them how hard it would be to learn it. Then draw the tic-tac-toe pattern and fill in the numbers. Say we often need to see the big picture to understand that things that look complicated at first may not be so. Mention that Collaborative Action Team members need to be able to link together, even though it may take a while to figure out the code for doing so.

²⁷ See note 1 on p. 7-1.

Things in Common²⁸ (15 minutes)

Give each table or small group of 5–7 team members a sheet of flipchart page. Have group members list as many things they have in common as they can in three minutes. Recognize the group with the most things in common. Then have members write down one unique thing about themselves. This shows that we have many common values, but that each person is still an individual with different talents and gifts.

Value Assessment and Consensus²⁹ (15 minutes)

Provide team members with a list of ten values, such as these suggested below, or develop your own list:

1. A satisfying family life
2. Job success
3. Fun, excitement, adventure
4. Good friendships
5. Personal growth
6. Neighborliness
7. Financial achievement
8. Contribution to society
9. Good health
10. Profession achievement

Give team members two minutes alone to drop three of the values. Then have participants meet in small groups for about 10 minutes. Ask them to agree on the seven most important values. Be sure that friends and coworkers aren't in the same small group but in separate groups. If groups have difficulty agreeing, it isn't of great consequence. What's important is to give them time to think about their own values and recognize how values affect choices.

The Wave³⁰

Beginning with one table, have team members do the wave (stand up and sit down in sequence around the table). Model first by simply asking team members to do the wave. Then explain that the

²⁸ See note 1 on p. 7-1.

²⁹ See note 1 on p. 7-1.

³⁰ See note 1 on p. 7-1.

team will do the wave again, only this time as each team member stands, they must share a favorite something, e.g., food, dessert, part of Collaborative Action Team meetings, sports figure or hero.

Yes, I Have Preferences³¹ (10 minutes)

Ask team members to take five minutes to fill in what they prefer for each item as you call it out. Read the following list out loud:

- | | |
|------------------------|----------------------|
| 1. State (in the U.S.) | 10. Color |
| 2. City (in the world) | 11. Bird |
| 3. Soup | 12. TV program |
| 4. Main dish | 13. Type of vacation |
| 5. Beverage | 14. Movie actor |
| 6. Dessert | 15. Tree |
| 7. Movie | 16. Flower |
| 8. Book | 17. Outdoor activity |
| 9. Athletic team | 18. Indoor activity |

As time allows, go through the items and ask team members to share their preferences to get an idea of their similarities and differences.

³¹ Eitington, J. E., *The Winning Trainer: Winning Ways To Involve People in Learning*, Gulf Publishing Co. ©1989. Permission to copy granted by publisher.

**Southwest Educational
Development Laboratory**

211 E. Seventh Street
Austin, TX 78701
voice: 512/476-6861
fax: 512/476-2286
www.sedl.org